

Leadership Legacies: Leveraging the Transfer of Leadership Knowledge through Community Mentorship

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EXECUTIVE SUMMARY

Mentorship and its application as a development tool have evolved significantly over the last half century. What began in the West primarily as a process of hand-picking protégés to groom and acclimate within a corporate culture as business successors has in the last decade been reclaimed by the commons as a way to cultivate leaders who are conversant with the complexities of community development and civil society. Leadership Victoria Society (LV) is one such agency located in Victoria, British Columbia dedicated to fostering community-engaged leaders through experiential training and mentorship over a ten month period. This report is written in assessment of LV's mentorship program which began in 2000 as a component of its annual Community Leadership Development Program.

Research Questions

The two research questions are interconnected and relate to the client organization's objective of developing effective community leaders using mentorship:

- *How effective is Leadership Victoria's current mentorship program in transferring leadership knowledge and values from its mentors to its mentees?*
- *What changes can be made to the mentoring program that positively impact outcomes such as knowledge and values transfer and satisfaction for mentees, mentors and the organization?*

Literature Review

Mentorship has long been recognized as a valuable tool in transferring knowledge from one more experienced individual to another with less experience, but recent literature on the subject indicates that more dynamic and engaging models of mentorship exist beyond the traditional unidirectional concept. Scholarly and business publications from the United Kingdom, the United States, Australia and Canada were sourced for this review. Of particular focus were the prolific conference proceedings from the University of New Mexico's annual conference on mentorship. The review captures current trends and best-practices for practical application within a community mentorship program and examines ways that mentorship has emerged and transformed within a relatively short span of time.

Methodology

The research design consisted of an enquiry-based study that collected first-hand, lived experience data on the subject of community-based mentorship. Two research instruments were used to gather the data: an electronic survey polled mentees'

experience over the last decade, and semi-structured telephone interviews elicited first-hand experiences from both the pool of mentors and a selection of external non-profit managers who were responsible for community mentoring programs. Client documents were examined and provided secondary data pertaining to mentoring. These included two mini surveys, simple training documents and samples of mentor biographies used by mentees for mentor selection. These assisted in establishing a baseline for the research.

Research methods consisted of electronic surveys and interviews with two key stakeholder groups accessed through the organization's databases. Mentees and volunteer mentors from the previous decade were contacted with LV's assistance. A third sample group of managers of non-government organizations (NGOs) with community mentoring programs were also interviewed to provide context and best practices for comparative purposes.

Findings

Research findings from this project were similar to the earlier survey results. The research further indicated that widespread confusion about expectations of mentors and mentees which implied the need for a more stringently applied orientation or training process. Current training and pairing procedures appear to be ad hoc which may have led to inconsistencies in perceived successful mentorships, including lack of appreciation of mentors' time and the inability of mentees to take initiative and plan for their futures.

The question of age at the time of participation was explored as a possible limitation to the perceived success of the relationships. Mentees who reported highly successful mentoring relationships spanned the ages from 20's to 60's. Likewise, mentors' ages seemed to have no impact on their perceived levels of satisfaction. Mentors who had retired from the workforce (and presumed to be less bound by a schedule), reported just as many complaints of time constraints impeding their ability to meet with their mentees as those which remained in the workforce. Barriers to successful pairings included mismatched personal communication styles, unwelcome matches of the opposite sex, differences in personal priorities, and cultural/religious differences.

Mentees appeared to lack understanding that mentorship was an opportunity for personal growth and exploration in confidence, and knew little of their responsibility to initiate subsequent meetings after the initial contact had been made. Few if any mentors discussed a development plan with their mentees, although several mentors indicated that they had expected mentees to have these plans in place prior to the mentoring relationship.

Best practices from other NGOs with mentoring programs revealed consistent training approaches which were universally applied, support manuals including templates of pre-planned schedules of meeting expectations, and suggested topics of interest as conversation starters between mentors and mentees.

The NGOs employed an alternative pairing method than Leadership Victoria. One organization required the mentee to find their own mentor, which reduced mismatches, but was perceived to raise mentee anxiety. Another used a simple questionnaire to match mentee learning needs with skills of specific mentors. In this case there was little pressure to find a mentor within a specific timeframe as the program ran continually, rather than on an annual cycle. The emphasis was to find the mentor with the right fit before initiating the relationship. Examples include a mentee who is looking to improve on parenting skills is matched with a mentor with grown children or mentors who were business entrepreneurs being paired with individuals who indicated an interest in starting up their own business.

Best practices identified through NGO interviews and recent literature indicate increased successful mentorship interactions if, in advance of engagement, both parties receive the same or similar comprehensive orientation and outline of expectations. Perhaps predictably, clear and regular communication emerges as the key to starting, maintaining and finally closing a mentoring relationship. Careful planning the proactive collection and assessment of individuals' characteristics, stated desires and interests can be employed when making deeply engaged mentoring pairs.

Discussion

Although data revealed that stakeholder satisfaction was somewhat less than optimal, it was still considered important to the overall leadership development program. Many aspects of the program achieve the objective of transferring leadership knowledge and values from the volunteer mentors to the mentees. A concerted effort to consolidate and evenly apply training and orientation to all parties involved would likely result in less confusion about roles and expectations. Additionally, bringing the mentors into the cohort experience or otherwise supporting them through a mentor-only network acknowledges their hope to derive more benefit out of giving of their valuable time.

Recommendations

Sixteen recommendations for action have been identified and are divided into five areas where improvements have been indicated.

1. Training Practices

- A) Establish a baseline understanding of mentoring by adding an early training component for both mentors and mentees.
- B) Create a mentorship handbook for mentors and mentees that reflects the training components and outlines expectations.
- C) Arrange for the mentors to meet one another at the retreat separately from the cohort of mentees to establish and strengthen peer connections.

2. Pairing Practices

- A) Elicit standardized mentor biographies using a template of specific questions to ensure consistency of information for distribution to the cohort (mentees).
- B) Gather mentee biographies and a list of desired mentorship outcomes using questions similar to those asked of mentors above.
- C) Give mentors the opportunity to select a mentee based on the mentee biographies and desired outcomes lists provided.

3. Stakeholder Engagement

- A) Share the Cohort's learning schedule (including dates) with mentors to allow them to anticipate and discuss LV program-related content and expectations with their mentees.
- B) Extend direct invitations to mentors to participate and socialize with mentees at the Learning Day sessions allowing them to better familiarize with the demands of the Cohort.
- C) Facilitate the development of a mentoring community of practice to build a pool of trained mentors in the community.

4. Tools for Success

- A) Provide a template to the mentoring pair for articulating desired outcomes and agreed upon commitments (Such as a Memorandum of Understanding).
- B) Provide a schedule with dates that suggests expectations for frequency of meetings. Mentoring pairs then have a framework of time expectations.
- C) Supply a list of suggested topics of discussion to both mentors and mentees.

5. Program Analysis

- A) Conduct annual exit interviews / surveys with mentors and mentees at cycle completion of LV program to gather valuable mentoring program feedback and to ensure proper closure has occurred.

- B) Upon cycle completion, assess mentors' interest in continuing to volunteer.
- C) Upon cycle completion, assess mentees' interest in volunteering on a Committee, and to establish whether further contact by LV is desired.
- D) Mentorship Committee to conduct a periodic review of non-profit community mentoring practices, with a view to keeping the program current and meaningful.

Conclusion

The contribution of this study is that it presents the client, Leadership Victoria, with both quantitative and qualitative data about its mentoring program collected from 38 mentee surveys and 10 mentor interviews, and situates that data in context of mentorship's evolving contemporary and historical practice as it is represented in academic and management literature. The stakeholder data was substantiated through data gathered by interviews with 3 local community-based mentoring program managers and examples of mentoring best-practices from the field. Important themes emerged and were discussed to provide some insight into the current state of the program and the implications the findings have for the organization.

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1. INTRODUCTION

Mentorship has become a crucial component within several community leadership development programs. In the context of non-profit community development, the broad goal is to enrich the lives of community members and to make communities, neighbourhoods, and the world a better place. Subsequently, leadership development casts a wide net, not only aimed at individuals, but also at organizations and greater civil society.

In recent years, developing non-profit leadership has become a prime concern within the sector due to a number of issues including: a changing workforce demographic that sees non-profit work as a stepping stone; an increase in charitable organizations; a perception that founders do not wish to release control leading to a lack of succession planning; and general competitiveness for leaders across the labour market (Toupin & Plewes, 2007, p. 128; Human Resource Council for the Non-profit Sector, 2011, online).

Formalized mentoring programs have changed significantly since their inception in the early 1980s. Some of the various directions taken with mentorship can be traced to evolution within continental boundaries, while other developments relate to the changing nature of the current labour force and can be summarized as generational differences. All over the world, the way individuals work and their interactions in the workplace has changed. Hierarchies are flattening, power is being shared and leaders are not always at the top of the pyramid. It is little wonder the ways people learn and orient themselves as citizens are changing too. Only one or two generations ago, people expected to have and hold onto careers for life. Now, generation Y appears to expect complete fulfilment within the workplace seeking multiple opportunities for challenge and advancement, with little expectation of impact on their social obligations (Toupin & Plewes, 2007, p. 128).

Mentorship and its application as a development tool have evolved significantly over the last half century. What began in the West primarily as a process of hand-picking apprentices to groom and acclimate protégés as successors within a corporate culture, has in recent years been claimed by the commons to cultivate leaders who are conversant with the complexities of community development and civil society. The goal of the former is the maintenance of the status quo, while the latter is to bring about societal change through fostering community-minded leaders. This second reasoning is the motivation of the client, Leadership Victoria for whom this study is produced.

Mentorship has been part of societal development since time immemorial where cultures everywhere on earth have sought out and encouraged pairings of people with the

intention of transferring valuable knowledge. Indeed, working along a spectrum, oral cultures as well as highly institutionalized societies acknowledge that personal, one-on-one interactions through intentional, long-term relationships are among the best ways to derive deeper meaning, replicate knowledge and instill values.

The Problem

Western society faces unprecedented challenges that require a different way of thinking - a new approach to address the wide spectrum of societal issues such as homelessness, illiteracy, food security, mental health, and addictions. From food banks to income disparity and from housing to education, individual societal problems have long garnered the attention, hard work and finite resources of special interest groups and their volunteers. Development of community-minded leaders who envision high-level, complex and collaborative solutions are needed to unite the many isolated efforts currently on offer. However, a leadership deficit has been identified within the non-profit sector. As Baby Boomers retire and subsequent generations appear less interested in entering into community-focused careers with non-profits, executives echo the need to invest in leadership development (Human Resources Council for the Non-profit Sector, 2010, p. 6-9; Human Resources Council for the Non-profit Sector, 2013, p. 6-7).

In response, capacity-building organizations such as Leadership Victoria, as well as foundations and governments have invested in a wide variety of pilot projects, studies, focus groups and other initiatives designed to address this deficit in community-based leadership. Leadership Victoria believes that such leaders can be developed, that community-minded values can be transferred and that leaders can come from all sectors of community.

Research Questions

Leadership Victoria believes that strengthening mentoring connections between established leaders (mentors) and emerging leaders (mentees) will impart knowledge and instill values of collaboration needed to effectively develop community based solutions across areas of interest. It is not known whether its mentorship program designed and implemented over a decade ago is reflective of the changing needs of emergent community leaders, as no comprehensive review of the mentoring component has taken place.

Leadership Victoria feels that the traditional model of transferring knowledge from one generation of leaders to another remains valuable as current program achievements reveal. However, signs of dissatisfaction and misunderstanding of the mentoring component have surfaced within the organization. Indicators have included participants' talk of failed pairings with little perceived benefit for those involved, staff observations of

less than optimal volunteer mentor retention, reports of low meeting frequency and general mentee apathy. Leadership Victoria wishes to achieve more mutually beneficial outcomes. This report therefore aims to answer the following two research questions:

1. *How effective is Leadership Victoria's current mentorship program in transferring leadership knowledge and values from its mentors to its mentees?*
2. *What changes can be made to the mentoring program that positively impact outcomes such as knowledge and values transfer and satisfaction for mentees, mentors and the organization?*

The research strategies developed to examine and address these questions include:

- Evaluating the existing mentorship program by gathering experiential information from its stakeholders including mentees and volunteer mentors;
- Interview local managers from other non-government organizations with community-based mentoring programs to share experiences and compare best-practices;
- Improve the practical application of mentoring (training) knowledge for both mentors and mentees;
- Determine recommendations that enhance the organization's effectiveness in transferring leadership knowledge to its annual cohort and;
- Increase perceived program value among participants.

Overview of Report

Following this Introduction, Chapter two provides the reader with the background and brief history of the research client, Leadership Victoria and contextualizes their local work among the national, provincial and community leadership development sectors.

Chapter three reviews current and salient literature from scholarly writings including conference proceedings, and dialogues on the subject of mentoring - identifying its various functions and approaches. The review provides a sampling of up to date academic literature on mentorship, leadership and knowledge transfer. In this chapter traditional to contemporary applications are examined, including best situational use for each type of mentoring approach.

Chapter four addresses the methodology used in conducting the research, and the design to include three distinct groups. Electronic surveys as well as qualitative interviews were employed. Data from organizations external to the client add value and context for

mentoring program organizers. The scope and estimated size of the three separate populations of interest for the study are introduced including how they were accessed by the researcher.

Chapter five presents the findings of the research data from an electronic survey and two directed interview groups. Discoveries from the organization's internal documents are also discussed and provide baseline data. Limitations of the study are also addressed.

Chapter six contains a discussion of the findings which emerged from the data in chapter five in relationship to the literature examined.

Chapter seven contains the researcher's recommendations for the client's implementation which include immediate and long-term considerations.

Chapter eight concludes the report and presents the researcher's observations on the future directions for the practice and its place in fostering community mentoring relationships with positive outcomes for all involved.

2. BACKGROUND

Leadership Victoria is a non-profit organization that provides community-based leadership development programs in Greater Victoria. Leadership Victoria is governed by a volunteer board of 14 directors responsible for two staff: an Executive Director and a Program Coordinator. The Board oversees five committees: Alumni Committee; Program Committee; Victoria's Leadership Awards Steering Committee; Victoria's Leadership Awards Nominating Committee; and Victoria's Leadership Awards Selection Committee.

Organizational Network

Aligned with several community non-profit organizations, local and provincial governments and through its membership in Volunteer Victoria, Leadership Victoria has been developing community-minded leaders in Greater Victoria. Participants enrolled in its annual program are drawn from these agencies - frequently as sponsored participants through places of work or volunteering. Less frequently, private citizens enlist as a means of forming strong community connections and to build existing personal networks.

The organization fosters collaboration and community partnerships through networking while providing opportunities for emerging leaders to put their newly learned skills into practice in the community. Over the past decade, the society has graduated nearly 300 emerging community leaders and is part of a growing network of national and international organizations focused on community leadership development, recognition and celebration.

Milward and Provan (2006) identify four distinct intentions of community networks: delivery of services, information dissemination, problem solving and building community capacity. Leadership Victoria's principal intent is building community capacity by preparing leaders to be fully engaged members of civil society. To accomplish this Leadership Victoria operates at each level by delivering services on behalf of funders; disseminating leadership information through workshops; and addressing community issues through community action projects (CAPs). The organization is supported through a mix of public and private sources, including assessing an enrollment fee.

Leadership Victoria Programs

Leadership Victoria was founded on the belief that community leadership skills can be taught, learned and practiced in order to strengthen community networks and alleviate issues more effectively. Salamon (2005, p.13) gave the title of professional citizens to skilled individuals that work toward and are trained in identification, analysis and solution of public problems.

The idea to form Leadership Victoria materialized out of Volunteer Victoria's Board of Directors who identified a need to develop professional citizens with skills and abilities necessary to address and solve complex, cross-sector problems in Greater Victoria. Emerging leaders would come from a wide spectrum of the community and represent government, non-profit, corporate and independent citizens.

Every year since 2001, a group of approximately 25 individuals from the community has been selected to participate in a rigorous ten-month community leadership development program which incorporates a mandatory mentorship component. This group is referred to as the cohort, and represents the mentees within this report. Further, volunteer mentors are selected from the community and paired with an individual mentee for the duration of their program. The result by design is the engagement of an equal number of mentors and mentees annually. The first cohort graduated in 2002.

A major component of Leadership Victoria's core program and the subject of this research is its mentoring approach. Upon entering the program each September, relationships between participants and volunteer mentors are forged. By encouraging mentoring relationships between proven community leaders and emerging leaders, the organization hopes to impart beneficial knowledge and community-minded values believed necessary to effectively address long-standing community issues such as homelessness, illiteracy, addiction and child poverty.

Leadership Victoria's three key programs incorporate the leadership development approaches identified by the Human Resources Council (2010, p. 34). They are listed after each brief program description. The key programs provided by Leadership Victoria are:

- A core ten-month experiential-based learning program which immerses participants in solving real-world community issues (*Non-profit capacity building, community leadership, peer support and networks, experiential learning, innovation and incubation, and fellowship*). Mentorship pairing is a required component of the program, and the subject of this research report (*Mentorship*).
- The annual Victoria Leadership Awards (VLA) event, led by Leadership Victoria in partnership with the Victoria Foundation, University of Victoria, Royal Roads and the Rotary Clubs of Victoria, is a collaborative celebratory initiative which recognizes outstanding community leaders and citizens across the capital region (*Recognition*).
- Provision of regular and accessible leadership workshops and symposia which target opportunities for community leaders to gather and challenge conventional wisdom of pressing issues (*Policy and field building, Peer support and networks*).

This report concentrates specifically on the evaluation and analysis of the mentoring component of the core ten-month leadership development program.

Previous Research: Internal Documents

Several documents internal to the organization were provided by the organization for both baseline and comparative purposes. These were: a mini survey of mentees conducted at the end of the program in 2012; a mini exit survey of mentors conducted in 2012; a recently revised mentor training document; and 24 self-written mentor biographies provided to the researcher as a sample of those given to new mentees upon intake for the purpose of selecting their first through third mentor choices.

Of the mini survey for mentees, responses revealed variable satisfaction with their mentoring interactions: 44% citing 'extremely positive' and 11% citing 'extremely negative' interactions. The middle ground response was 'somewhat positive' at 33%. Information from this key client group rationalizes the need for further investigation in identifying ways of improving outcomes. Analysis of these documents is included later in this document.

3. LITERATURE REVIEW

The purpose of this literature review is to examine the various and changing uses, practices and employment of mentorship in a variety of settings which include community, academic and corporate examples. Scholarly and business publications from the United Kingdom, the United States, Australia and Canada were sourced for this review. Of particular focus were the proceedings from the University of New Mexico's annual mentorship conference. The review captures current trends and best-practices for practical application within a community mentorship program and examines ways that mentorship has emerged and transformed within the last few decades.

The first section of this review addresses the history of mentorship starting with its early use as a method to tailor leadership succession within the North American corporate sector. Some comparisons are drawn between North American and European practices where intents have evolved differently. Section 3.2 speaks to an assortment of definitions of mentorship by scholars and practitioners, outlines the various modes employed in the field and discusses the emerging trend toward inducing mutual benefits for those enlisted into mentoring relationships. Section 3.3 identifies situations where specific mentoring modalities are employed and introduces various mentoring schemes to match desired outcomes with selected approaches. Section 3.4 highlights examples of best-practice within the broad context of mentorship. Finally, section 3.5 presents a summary of the literature review.

3.1 History of Mentorship

Mentorship has been recognized as a valuable tool in transferring knowledge from one more experienced individual to another with less experience, but recent literature on the subject indicates that more dynamic and engaging models of mentorship exist beyond traditional unidirectional concepts. Whether formal or informal in nature, the functionality of mentoring is diverse. Mentoring has been widely recognized as one of the oldest forms of knowledge transfer. Examples can be found in current and historic agrarian cultures where elders pass on traditional knowledge of land use to their younger counterparts (Stephenson, 2009). Much of the early studies of mentoring in the workplace focussed on mentors informally championing the development of a mentee's career. This early and enduring view of career-related functions of mentors involved the provision of guidance and passing on of an organization's cultural information a mentee needed to rapidly advance within the workplace (Levinson, Darrow, Klein, Levinson & McKee, 1976, p.23).

In the early 1980's scholarly discussions evolved around the mentoring construct and key dimensions in a mentoring relationship that were career and/or psychosocial related

(Kram, 1985; Haggard, Turban, Dougherty & Wilbanks, 2011). Kram (1983) also identified five principal mentoring functions which remain relevant over time: coaching; sponsorship; exposure and visibility; challenging assignments; and protection. For mentees these benefits included increased confidence and self-awareness (Kram, 1983; Kram, 1985) - ideas that had first surfaced during contemporary mentorship's developmental stages (Levinson, Darrow, Klein, Levinson & McKee, 1976). Discussions about the psychosocial functions of mentors - including role modeling, counseling, acceptance-and-confirmation, and friendship - had been noted early on (Kram, 1983) along with their benefits which included respect from peers, personal satisfaction and confirmation and support from the mentee (Kram & Isabella 1985).

In the mid to late 1980's ideas of alternatives to traditional mentoring emerged such as peer relationships in career development (Kram & Isabella, 1985), cross-gender relationships (Clawson & Kram, 1984) and cross-racial pairings (Thomas & Kram, 1988), although in-depth studies of these subjects as barriers did not occur until the 1990's (Dreher & Ash, 1990 ; Dreher & Cox, 1996). Main purposes for entering mentoring relationships were tied to specific functional expectations like transferring skills and aligning corporate behaviour while concentrating on career outcomes (Noe, 1988, p. 457).

Differences in outcomes were noted between informal and formal relationships. Chao, Walz & Gardner (1992, p. 630) found that mentees in informal relationships received more career-related functions while mentees in formal relationships received more psychosocial functions, when compared to non-mentored individuals, either mentored group fared better. These studies were mostly from the perspective of the mentee. Burke & McKeen's (1990, p. 326) research suggested that women, more so than men, receive psychosocial support while men receive more career-enhancing or instrumental support.

Around the world mentoring is relatively non-directive and learner centred; however, some forms, particularly in North America may be more hands-on and place more emphasis on the mentor using their authority on behalf of the mentee. Regardless of location, mentoring is a powerful form of learning alliance between people (Clutterbuck & Megginson, 1999). Through continued involvement mentors offer support, guidance and assistance as mentees enter a journey of transformation, go through a difficult period, face new challenges, or work to correct problems (Megginson, 2000). While the mentor is oftentimes more senior than the mentee, this is not always the case: peer mentoring, reverse mentoring, and mentoring constellations are increasingly common examples where knowledge defies top-down mentoring tradition and travels bottom-up, laterally or even in circles, clusters or triads (Clapp, 2010).

In Europe, including the United Kingdom mentoring and knowledge management literature evolved in support of a holistic approach of whole person development. Researchers there more frequently explored psychosocial functions of mentors such as modelling work/life balance and shoring up feelings of confidence and self-efficacy. Discussions about European preferences in mentoring revealed that differences in approaches meant that European contexts required different measures of mentoring functions than those presented in North American literature (Gibb & Megginson, 1993, p.40-54; Clutterbuck & Lane, 2004). Clutterbuck and Megginson (1999) produced Table 1 below which outlines differences in American versus European mentoring goals, relationships and schema.

Table 1: Characteristic approaches to executive mentoring by country

Country	Goals	Style of Relationship	Features of Schemes
USA	Sponsorship / Promoting Career	Paternalistic	Senior Director taking up cause of younger high flyer
France	Insight/ Analysis of Life Purpose	Commitment to sharing values	Scheme created outside companies
Netherlands	Mutual Support/ Learning/ Networking	Informal/ Egalitarian/ Peer Mentoring / Universal	Recognizing benefits for Mentor and Mentee/ Personal and Professional
Sweden	Perpetuate Culture	Share understanding /Exchange Knowledge	Strong sponsorship from HR and CEO/ Well researched and Planned/ Involves all in categories targeted
Britain	Insight/ Learning/ Support	Individualistic / Charismatic Mentor shares insight and challenges mentee	Ad Hoc / Diversity of opportunities

(Clutterbuck & Megginson, 1999)

In the 1990's the scope of studies on mentorship widened to consider the mentor's viewpoint including motivation for becoming a mentor such as altruism, respect as well as the idealization of the relationship (Crosby, 1999, p. 3-20). Reasons why and how mentors

became part of a developmental network were also explored to a limited degree such as personal career-enhancement, workplace acknowledgement, better management skills and greater workplace satisfaction (Allen, Poteet, Russell, & Dobbins, 1997, p. 1-22; Ragins & Cotton, 1993, p. 97-111). Reasons for unsuccessful mentorships were also discussed, such as a lack of mentee preparedness, insufficient training and lack of shared perspective and approach to the process (Pfleeger & Mertz, 1995, p. 63-72).

Ongoing research of cross-gender and cross-racial mentoring success conducted by Dreher and Ash (1990) and Dreher and Cox (1996) found that psychosocial benefits were more prevalent within cross-gender and cross-race pairings than between same-gender, same-race pairs. However, the most career-enhancing benefits received were by mentees of any race, gender or social identity when paired with a white male mentor (Ragins & Cotton, 1999). These findings led researchers to examine the power dynamic and intimate that women and minority mentees in particular, may be better served by a network or constellation of mentoring relationships based on characteristics as age, gender and race in order to derive optimal outcomes from a variety of mentoring relationships (Ragins, 1997, p. 482-521; Ragins & Cotton, 1999).

Blake-Beard (2001, p. 331-354) agreed and further cautioned that if cross-gender and cross-racial relationship benefits are to occur at all, they need to be identified and addressed up front, and that inherent challenges can be overcome through matching using shared non-gender and non-racial *deep level* characteristics such as values, attitudes and beliefs, as well as salient *surface level* characteristics such as age and ethnicity (O'Neill & Blake-Beard, 2002, p. 51-63). Dunn (2009; UNM, p.27-35) cited lack of congruence between mentor and mentees as a reason for lack of success and suggested, like her predecessors, that best matches share attitudes, beliefs and values.

Correlations between a mentor's gender and status were tied to a mentee's upward career mobility – with white males faring best of all (O'Neill & Blake-Beard, 2002; Allen, Eby, Poteet, Lentz & Lima, 2004, p. 127; Levesque, O'Neill, Nelson, & Dumas, 2005). Studies of mentors' processes for selection of their mentees indicated high-aspiring mentors, especially female ones, more frequently chose mentees with the highest perceived capabilities over those who appeared to need more career assistance (Allen, Poteet & Russell, 2000, p. 271). Negative behaviours by mentors such as manipulation, lack of expertise, distancing, dysfunctionality and mismatch (Feldman, 1999; Eby, McManus, Simon & Russell, 2000, p. 14-16; Allen & Eby, 2007) as well as those by mentees such as unwillingness to learn, submissiveness, sabotage, deception and harassment (Eby & McManus, 2004, p. 255-275; Eby, Durley, Evans & Ragins, 2006, p. 424-444;) were explored.

First movements to examine in-depth the notion of mentoring networks or constellations to achieve optimal outcomes were made early in the new millennium (Higgins & Thomas, 2001), partly in response to studies that signified a mentee's multiplicity of needs could not adequately be met by a single individual (Zachary, 2000). Similarly, Orpen (1997) had demonstrated the positive link between multiple opportunities for learning interaction and increased motivation and commitment of mentees. Higgins and Thomas' (2001) research found that mentees in dyads (two-person mentoring relationships) experienced fewer positive attitude shifts, career-enhancements and psychosocial benefits than did their counterparts engaged in mentoring networks or constellations. Further, those in networks were found to stay longer within their organizations.

Zachary (2000) outlined mentorships as mutual learning partnerships, moving away from unidirectional knowledge transfer towards several two-way, power-free relationships with mutual benefits. She emphasized the need for mentees to take the initiative and prepare adequately for the relationship by first assessing their own learning needs, then defining the characteristics desired in a mentor so as to ensure their own development.

Sub-dividing mentoring relationships into definable phases was already a practice when Zachary (2000) introduced her four mentoring relationship phases -preparing, negotiating, enabling and coming to closure – marking formal mentorship's transition to more mainstream self-development curricula which included tools and techniques such as prearranging meeting dates and setting time frames for the relationship to end (Chao, 1998). Clutterbuck and Lane (2004, p. 4) furthered this notion and posited that each phase required an adjustment in a mentor's behaviours as defined below in Table 2. Clutterbuck (2005, p.4) citing Klassen and Clutterbuck (2002) defined the types of questions used in mentoring - such as reflective, hypothetical, justifying, probing and checking - to bring about specific aims of the relationship such as increased self-assessment and development of critical thinking skills.

Table 2: Suggested Mentor Competencies for Each Phase of the Mentoring Relationship

Mentorship Relationship Phase	Suggested Competence
Building Rapport	Active listening Empathising Giving positive regard Offering openness and trust to elicit reciprocal behaviour Identifying and valuing both common ground and differences
Setting Direction	Goal identification, clarification and management Personal project planning Testing mentee's level of commitment to specific goals

	Reality testing – helping the mentee focus on a few achievable goals rather than on many pipedreams
Progression	Sustaining commitment / Ensuring sufficient challenge in the mentoring dialogue Helping the mentee take increasing responsibility for managing the relationship Being available and understanding in helping the mentee cope with set-backs
Winding Down / Professional Friendship	Manage the dissolution process Ability to redefine the relationship when it has run its formal course

Clutterbuck and Lane (2005, p. 4)

By 2005, electronic or online mentoring became prolific and viable (Ensher, Heun & Blanchard, 2003, p. 264-288), along with peer or lateral mentorships taking hold alongside creation of professional developmental networks and communities of practice (Dobrow & Higgins, 2005; DuBois & Karcher, 2005, p. 5). Later studies explored the nuances of how and why knowledge transfers from a more experienced individual to a lesser experienced one (Eby, Rhodes & Allen, 2007; Eby, 2007). Nearing the end of the 2000's Blake-Beard, O'Neill and McGowan (2007, p. 617-632) purport the use of assessment-based matching methods in workplace formal mentoring programs to make the transfer of knowledge most effective.

Much of the management literature on workplace success has been directed to the quick acquisition of core competencies (Parker, Hall & Kram, 2008, p. 487-503) that manifest as two distinct types of knowledge assets: critical skills and managerial systems (Swap, Leonard, Shields & Abrams, 2001, p. 96-97). Swap et al (2001) posited that much of what needs to be learned in management is tacit and intangible knowledge which is quickly and effectively transferred by implicit means found in mentorship and storytelling, unlike critical skills which can be transferred operationally through formal and explicit means. Miller, Mallam & Harris, 2009, UNM, p.72-75) reinforced this notion with research conducted on emerging generation x -aged STEM (science, technology, engineering and math) professionals and recent graduates that showed visible and participative involvement with a mentor or senior professional is required to receive and embody tacit knowledge.

3.2 Defining Mentorship Modes

Mentoring - from the Greek word meaning enduring, has been defined by Megginson (2000) as a sustained intentional learning relationship between two individuals. While this simple notion persists across the many attempts to define mentorship, finding a common

definition remains elusive due to processes and modes within the sector being highly differentiated (Dubois & Karcher, 2005, p. 3-5). Haggard, Dougherty, Turban and Wilbanks (2011, p. 285) identified 40 definitions of mentorship in academic and management literature dated between 1980 and 2009, and offer a few verbatim samples in Table 3 lifted from the research documents illustrating the range of definitions from least to most specific.

Table 3: Examples of Mentoring Definitions

A senior manager who provides emotional support, guidance, and sponsorship to a less experienced person. Kirchmeyer (1995: 72)
Someone in a position of power who looks out for you, or gives you advice, or brings your accomplishments to the attention of other people who have power in the company. Fagenson (1989: 312)
Someone, other than your manager or immediate coworkers, who provides you with technical or career advice, coaching, or information on an informal basis. Seibert (1999: 493-494)
An influential individual in your work environment (typically a more senior member of your organization or profession) who has advanced experience and knowledge and who is committed to the enhancement and support of your career. Forret and de Janasz (2005: 484)
A mentor is defined as an individual who holds a position senior to yours who takes an active interest in developing your career. While it is possible for an immediate supervisor to serve as a mentor, relationships of this type represent a special opportunity to interact with a senior manager. The standard subordinate/supervisor relationship is <i>not</i> a mentoring relationship. In the questions to follow please indicate whether or not you consider one or more individuals to be your mentor (while it is possible to have multiple mentors, the nature of the relationship implies that the number of people appropriately classified as your mentor will be small.) Dreher and Chargois (1998: 406); Dreher and Cox (1996: 301)
This questionnaire uses the concepts 'mentor' and 'coach' and 'protégé' several times. Not everybody uses the same definitions for these concepts therefore we ask that you read the following definitions with care before responding to the questions. A protégé is the person who is guided and supported by a mentor or coach. A mentor is an influential individual with a higher ranking in your work environment who has advanced experience and knowledge so he/she can give you support, guidance, and advice for your development. Your mentor can be from inside or outside your organization, but is not your immediate supervisor. He/she is recognized as an expert in his/her field. Most of the mentor relations are long term and focus on general objectives of development. Van Emmerik, Baugh, and Euwema (2005: 314)
Mentoring is described as a one to one relationship between a more experienced and senior person (Mentor) and a new entrant or less experienced person (his/her

protégé) in the organizational setup. The Mentor need not be the supervisor or department head and not necessarily from the same department. A mentor can generally be defined as an influential individual in your work environment who has advanced work experience and knowledge and who is committed to providing upward mobility and support to your career. Then subjects were instructed, You may not have experienced mentoring in a formalized manner but informally at some point in your career or even currently, you may be relating to some person who provides you with psychosocial support as well as shows interest in your career movement.

Scandura and Williams (2001: 349; 2004: 455)

Over the course of your career, have you had a mentor? A mentor is an experienced employee who serves as a role model, provides support, direction and feedback regarding career plans and interpersonal development. A mentor is also someone who is in a position of power, who looks out for you, gives you advice and/or brings your accomplishments to the attention of people who have power in the company. In order to assist individuals in their development and advancement, some organizations have established formal mentoring programs, where protégés and mentors are linked in some way. This may be accomplished by assigning mentors or by just providing formal opportunities aimed at developing the relationship. To recap, formal mentoring programs are developed with organizational assistance. Informal mentoring relationships are developed spontaneously, without organizational assistance.

Day and Allen (2004: 77)

Haggard, Dougherty, Turban and Wilbanks (2011, p. 285).

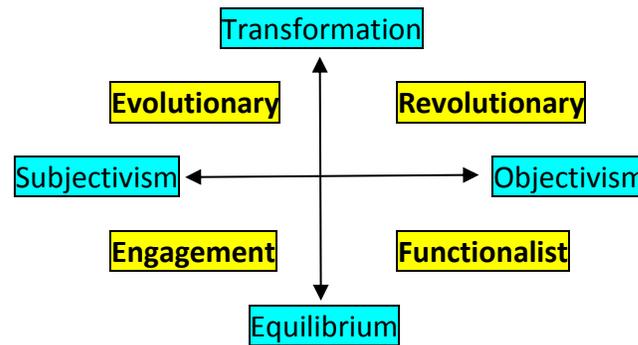
One can see how definitions have become more complex over time, trying to include the evolving notions in mentoring that support a multiplicity of practices all reaching towards goals of personal identity development, self-efficacy, psychosocial, emotional and cognitive growth (Rhodes, 2005). More recently, Jones and Corner (2012, p.396) researched their hypotheses that examining mentorship through the lens of complex adaptive systems (CAS) may be warranted acknowledging that knowledge transfer relationships are inherently complex and cannot be examined or explained completely utilizing predominantly linear frameworks.

Mentorship Types

Through continued involvement, mentors offer many types of support, guidance and assistance as mentees enter journeys of transformation, navigate difficult periods, face new challenges, or work to correct problems (Megginson, 2000). While the mentor is oftentimes more senior than the mentee, this is not always the case: peer mentoring, reverse mentoring, and mentoring constellations are increasingly common examples where knowledge defies top-down mentoring tradition and travels bottom-up, laterally or even in circles, clusters or triangulation (triads) (Clapp, 2010).

Brockbank and McGill (2006) offered a mentoring classification system shown in Figure 1, linking philosophical intent (subjectivism vs. objectivism) with intended learning outcomes (equilibrium vs. transformation). It provides managers with a framework to be critically reflective then strategic when designing formal mentoring programs.

Figure 1: Map of mentoring approaches (Brockbank & McGill, 2006)



1. **Functionalist** - ensures the status quo and defines measurable goals (Brockbank & McGill, 2006) while focusing on career-enhancing benefits and assimilation (Dominguez, 2008, UNM).
2. **Engagement** - emphasizes personal development through nurturing relationships and maintains the status quo (Brockbank & McGill, 2006) while focusing on psychosocial benefits (Dominguez, 2008, UNM).
3. **Evolutionary** – encourages mentees to take ownership of their learning and challenge existing power dynamics (Brockbank & McGill, 2006) when personal transformation is the focus (Dominguez, 2008, UNM).
4. **Revolutionary** – seeks to promote societal transformation and organizational change by going against the status quo (Brockbank & McGill, 2006) while recognizing equity (Dominguez, 2008, UNM) and accepting knowledge wherever it originates (Clapp, 2010).

Mentorships are established either formally or informally. However, in either case, the relationships will be developmental and intentional. Formal mentorship - also known as planned mentoring - can be described as consisting of a facilitated matching process with approved training and stated goals to assess success. It is structured within a defined time period and capitalizes on the knowledge of mentors. Informal mentorships - also known as natural mentoring- appear to form organically with specified developmental intent, yet are unbound by the structures, phases and time frames of formal mentoring programs (Clutterbuck, 2009). Informal mentorships can last for decades and span careers and are known to frequently transfer into lifelong friendships.

Traditional

In the traditional mentoring scenario knowledge and expertise flows down a hierarchical chain, usually, but not always within the workplace. In this top-down mode, the more senior mentor draws upon a deep knowledge base to teach and guide a usually more junior co-worker or subordinate (Levinson, Darrow, Klein, Levinson & McKee, 1978).

Peer or Lateral

In peer to peer or lateral mentorship, knowledge and expertise flows between counterparts or people in the workplace at relatively comparable levels of practice, but mainly outside of their existing areas of expertise (Kram & Isabella, 1985; Hall & Kahn, 2001.) There is no hierarchy involved in this model (Cameron, Dutton & Quinn, 2009; Dutton & Ragins, 2007) therefore issues of power-over generally do not arise.

Constellation or Cluster

In constellation or cluster mentorship the focus remains the mentee's development, but two or more mentors work independently or as a team in development of their shared mentee, frequently on different aspects of that development. Clusters differentiate themselves from regular networks, in that they are not intended to be an ever expanding web of contacts, associations and friendships, but rather are intentional arrangements to cross-pollinate ideas and sources of knowledge ultimately for the benefit of the mentee (Kram, 1988). This is known as a triad when formally applied - as in academia.

Reverse or Bottom-Up

In reverse or bottom-up mentoring, a person of lesser seniority, and often younger age, mentors an individual considered up the ladder with more seniority. A relatively new concept, mentoring up is informal in nature. This format of mentoring defies established hierarchies and challenges paternalistic notions (Clapp, 2011; UNM, p.126-131). To the best of the researcher's knowledge, no formal bottom-up mentoring programs exist. Rather, reverse mentoring appears only to occur in situations and within organizations that exemplify a mentoring culture and the sharing of power and knowledge.

Omni-Directional

Omni-directional mentoring combines the concepts of mentoring-up and lateral (peer) mentorship along with traditional top-down concepts. Clapp envisioned balanced exchanges of expertise and wisdom that form a web of teaching and learning across mentoring relationships (Clapp & Gregg, 2010; Clapp, 2010). In this arrangement, the roles of mentee and mentor shift at times to help one another with critical thinking about their self-development, to bridge generational gaps, and to create and realize life and/or career goals. This malleability proves to mentors their own abilities while learning themselves (Clapp, 2011; UNM, p. 126-131).

3.3 Situational Uses of Mentoring Types

Mentoring is a fundamental form of human development where a people invest time, energy and expertise in assisting the growth and ability of another person. As we have seen, this can occur through a number of nuanced modes. This section provides examples of commonly applied situational uses of the aforementioned types of mentorship and demonstrates their particular suitability within specific contexts.

Private Business and Corporations

Formal and informal applications are used in business proprietorships and corporations. Formal traditional mentorship is best used to quickly assimilate new workers or members to expectations and corporate culture (Kram, 1983) while informal peer mentorship assists organizations develop knowledge across silos, departments or areas of expertise to enhance opportunities for innovation. These methods frequently favour development of organizational systems rather than individuals. Informal mentorships may form naturally or be encouraged in the absence of formal opportunities. Formal traditional programs have the distinct advantage of appearing more equitable and providing developmental opportunities for anyone who wishes to participate while avoiding the perception of being hand-selected for succession (Clapp, 2010) as may be the case with informal mentoring.

Academia and Schools of Practice

Institutions of higher learning including some Schools of Practice such as Nursing and School Administration employ formal traditional mentoring as both training and orientation to academic and workplace culture (Owens & Patton, 2003; McCloughen, O'Brien & Jackson, 2011). In specific streams such as school administration, aspiring principals are required to work with a mentor to learn the ropes prior to, or concurrent with assuming their new responsibilities (Noe, 1988, p. 65-78). In America, 32 of 52 states have legislative policies to support mentoring programs for new school administrators (Searby, 2008 UNM, p. 180 citing Alsbury & Hackman, 2006).

Medicine and Careers in the Sciences

Medicine and scientific career applications include formal triad, constellation or cluster mentorships, assigning prospective doctors or scientific professionals with two mentors: one to act as career advisor and transfer specific on-the-job skills (Rymer, 2002; Zachary, 2000) and a second to ensure academic enrichment takes place - such a specialty interest during a residency. This cluster approach was adopted to address the very busy schedules of professionals acting as mentors with limited abilities to advise their several mentees. This has extended to other sciences where both laboratory and discipline expertise is highly desired (Fifolt & Searby, 2010).

Community and Leadership Development

Community-based mentoring programs use formal and informal traditional and peer mentorship or a blend of both to accomplish organizational mandates such as: youth support; issue coping mechanisms; leadership development; life skills transfer; supervisory or role modelling; situational insight; or volunteerism. Big Brothers/Big Sisters Association is an example of a blended approach for mentoring youth development through role modelling. Although a formal matching process takes place in this instance for security purposes, volunteer big brothers and sisters have autonomy to interact with their little brother or sister within specified parameters of behaviour (Grossman Baldwin & Tierney, 1998). The transfer of values, ideals or standards is generally a desired outcome of community mentoring programs.

Governments and Corporations

Governments and Corporations with a diverse workforce and commitment to equity in the workplace may choose to cultivate an omni-directional mentoring culture. Clapp (2010) presents this as being particularly useful in the growth of individuals contributing to a greater system, more so than for the growth of an isolated individual. Omni-directional mentorship serves to flatten out workplace hierarchies and breakdown silos rather than reinforce the status quo and power dynamic (Clapp, 2010, UNM). Such systems can include increasingly diverse, multi-generational and complex workplace environments.

3.4 Examples of Best-Practice

Within formal mentoring programs, best-practices emerge over time when tested by repetition, certain methods or actions lead repeatedly to enhancement of program outcomes - either measured or anecdotally. These may include increased stakeholder satisfaction, more rapid career development, increased retention of volunteer mentors and increased communication. Karen Kram (2004), one of mentorship's earliest and enduring champions condensed all the postulating and planning of mentoring over the decades down into a few succinct words:

“The most important lesson from all of these programmatic efforts is that the most effective strategies for fostering mentoring depend on the context in which they are implemented, the purpose for such initiatives, and the values, skills and attitudes of potential participants”.

The following strategies emerged repeatedly throughout the literature and inform practical implementation of mentorship.

Assess readiness for mentorship and prepare adequately for the relationship.

The literature reveals comparatively little about preparing mentees adequately for the mentoring relationship (Daresh & Playko, 1992; Mullen, 2006). However, studies of female school administrators entering mentoring relationships revealed that they prepare themselves in a variety of ways which fall along three themes: commitment to the relationship; mentee initiative; and understanding how mentoring works (Searby & Tripes, 2006). A protégéship framework set out in Table 4 was developed to ensure mentees are fully prepared for the development relationship ahead. Fifolt and Searby (2010) examined ways to prepare mentees for career longevity in the sciences, technology, engineering and mathematics (STEM) by promoting the adoption of a mentoring mindset during their internships and co-operative learning placements.

Table 4: The Protégéship Framework.

Characteristics for effective Protégéship	
Knowledge	Basic understanding of the teaching process Basic understanding of school leadership Understanding of various types of mentoring Awareness of potentials and pitfalls of mentoring
Skills	Goal setting Communication skills Capacity to seek out and act upon feedback Reflection
Dispositions	Willingness to learn Self-knowledge Demonstration of initiative Maintaining confidentiality Awareness of ethical considerations

(Searby, 2008 UNM, p.35 citing Tripes & Searby, 2007)

A few researchers have prepared diagrams to assist mentors and/or mentees to determine their readiness to mentor and be mentored. Owens and Patton (2003, p. 199) provide Table 5 which they compiled from the work of Gordon (2000) and Vance (2000) to assist understanding of mentorship behaviours. Although aimed at nursing professionals, the table provides a clear list of useful attributes that should assist any individual considering mentorship in knowing if their traits are aligned with the methodology of practice.

Table 5: Summary of Typical Characteristics and Behaviors of Mentors and Protégés

MENTOR CHARACTERISTICS	PROTÉGÉ CHARACTERISTICS
Generosity Competence Self-confidence Openness to mutuality	Takes initiative Career commitment Self-identity Openness to mutuality
MENTOR BEHAVIOURS	PROTÉGÉ BEHAVIOURS
Is knowledgeable, experienced & competent. Has willingness to invest time and energy to build relationship. Has good listening, observation, and communication skills. Provides career advice and guidance, shares dreams and instills vision. Supports, encourages, and inspires the protégé. Has good problem solving skills. Encourages independent decision-making. Maintains high but achievable expectations. Provides opportunities for protégé to excel. Role-models leadership behaviors.	Initiates and seeks advice or assistance from mentor. Openly shares needs and goals. Has good listening, observation, and communication skills. Is open to learning and risk-taking. Takes appropriate advantage of opportunities provided by mentor. Accepts constructive criticism, uses feedback wisely. Accepts limitations of the relationship.

Owens & Patton (2003, p. 199).

Johnson (2003) proposed the triangular framework shown in Figure 2 below, for determining competence to mentor in STEM academics. He proposed that when all three aspects of the triangle are combined in an individual: character virtues; cognitive, emotional and relational abilities; and competencies (knowledge and skills) a readiness to mentor is conveyed.

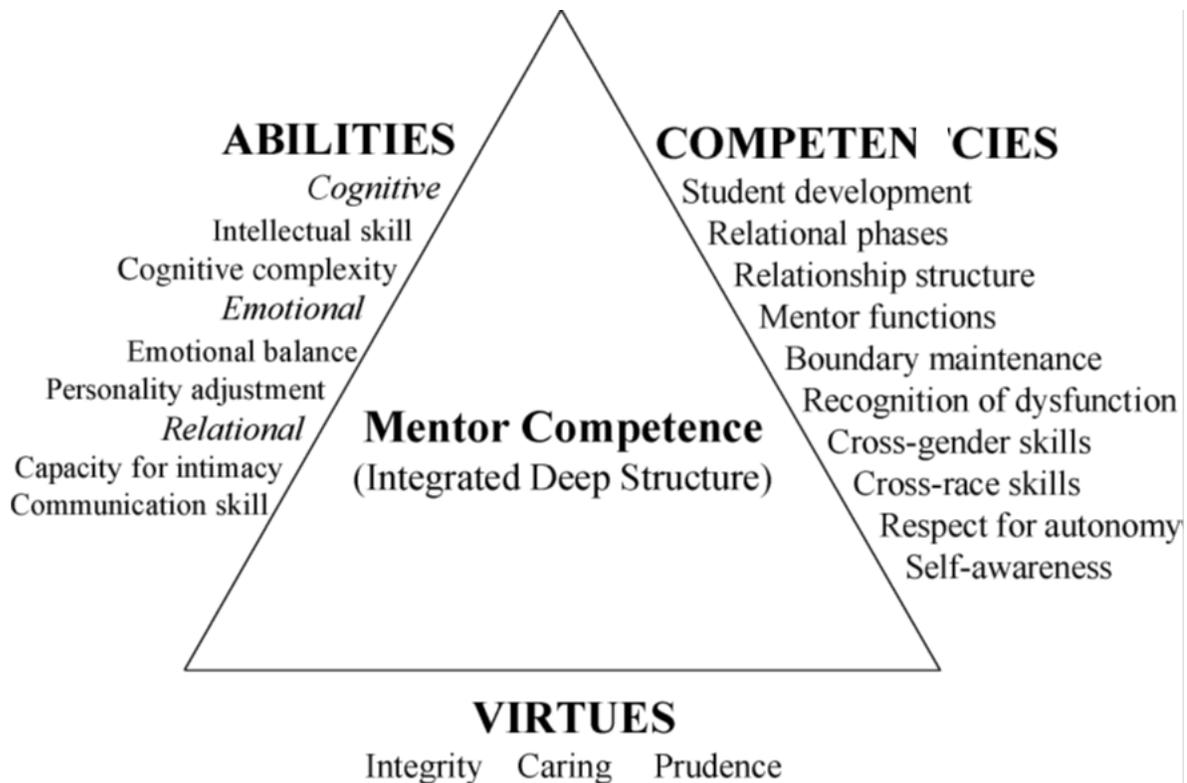


Figure 2: A framework for conceptualizing competence to mentor (Johnson, W.B., 2003)

Use personality type or other indicators for aided matching compatibility

Blake Beard, O'Neill and McGowan (2007, p. 617-632) emphasize the importance of matching work in formal mentoring relationships. Understanding what one hopes to gain from a mentoring relationship can assist a prospective mentee to know who they would like as a mentor and to create a list of desired traits and skills they hope to glean from the effort through personal reflective analysis (Zachary, 2009). Informal mentorships require only mutual agreement, but some formal mentoring programs allow mentees to make specific requests based on perceived mentor attributes from those in a pool, or even select their own mentor (Zachary, 2000). Miller (2011, P.132-137, UNM) supports the use of multiple intelligence quotient scoring tools to deeply align mentors and mentees in diverse relationships along social, cultural and emotional capabilities, acknowledging that better, more meaningful connections occur when shared values and beliefs are held in common (Blake Beard, 2009). Others use personality type indicators available online such as Myers-Briggs Type Indicator (MBTI) to assist managers in matching participants or who may not necessarily be in the same location (Miller, Mallam & Harris, 2009, p.72-75). Blake Beard et al (2007, p. 617-632) indicated that mentored students at University of Minnesota use MBTI as a stepping off point to self-analyse. Mentors then aid in this process by assessing personal values and challenging mentees against moral dilemmas to

build critical thinking skills. Whatever tool is utilized, the common objective is to achieve a higher degree of congruence between mentor and mentee.

Dunn, (2008, UNM) suggests that individuals should pay closer attention to social roles, and professional identities of their mentoring partners to derive greater benefit such as broader networks and diverse experiences from proposed mentoring pairs. Her theory is based on the need for identity congruence between mentor and mentee. Dunn suggests that pairings which lack this alignment may lead to failure. Deeper characteristics such as beliefs, attitudes and values in combination with surface-level characteristics such as age, gender and race, add to the connection or congruence in a pairing. Her findings also suggest that same gender, same race pairs are needed to better enable optimal outcomes, although O'Neill and Blake-Beard's (2002) research indicated that career outcomes for mentees did not appear contingent on either the mentee's race or gender, but rather on the race and gender of the mentor, finding that mentees of any race or gender realized more career-related benefits if their mentor was a white male.

Swap, Leonard, Shields and Abrams (2001, p. 95-114) draw our attention to literature which suggests that mentors may have difficulty working with novices when the knowledge gap between them may be too large to fill, or even too complex for the mentee to comprehend. To counter this, they suggest that a mentee select a mentor with more proximate skills to their own, but still above their existing skill level. They note that a shared context or meaning with the one imparting knowledge is necessary for cognitive learning to take place. Harvey (2012, p. 403) agreed and cites Cohen and Levinthal's (1990) finding that, in particular, a pair's cognitive distance from one another need not be too large so that their shared knowledge base can be expanded through absorption, clarification, interpretation and eventually application of the new knowledge. He further discusses that certain contextual spaces need to exist in order for explicit and tacit knowledge to transfer in this way, identifying that the spaces may be physical, virtual or mental.

Harvey (2012, p. 403) also expressed that although spatial proximity supports the interactions necessary for knowledge transfer to occur, it does not always ensure it. Rather, other forms of proximity such as cognitive, organizational, institutional or social can facilitate the flow of knowledge if the participants are socially attached through trust and reciprocity. Trust was also discussed by Fleig-Palmer and Schoorman (2011, pp. 336) as a moderator to successful knowledge transfer within mentoring relationships. They indicated that a greater degree of trust lead to greater levels of knowledge being transferred.

Train mentors and mentees for consistent understanding

Inconsistent understanding of mentorship's intended purposes, or misunderstanding of roles within the relationship can complicate and impede progress of a matched mentoring pair. Allen and Eby (2007, p. 309-316) revealed that mentees' most common complaints toward mentorship were perceptions of mentor neglect and unmet expectations. Both of these concerns can be addressed through proper orientation. Training, applied early and consistently to both mentor and mentee, ensures grounding in core values and objectives while safeguarding against wasted effort (Pfleeger & Mertz, 1994).

Because the benefits to mentees appear widely known, and require little work to build awareness, Eby et al (2006, p. 440) suggest that discussing lesser known potential benefits for mentors during training sessions should assist both sides in setting realistic relationship expectations and maximize potential. This is valuable as Eby and Lockwood (2005, p. 453) reveal that unrealistic expectations are often mentioned as problems within formal mentorships.

Select types of mentoring to achieve desired outcomes

Dominguez, (2008 UNM, p. 14) promotes the use of frameworks to assist mentoring proponents in understanding how desired outcome and perspective best determine an appropriate mentoring approach. She cites as helpful, the use of Bolman and Deal's (1997) four-frame organizational theory model to determine an organization's predominant character frame, either structural; human resource; political or symbolic, before determining a mentoring type. Clapp (2011, UNM, p. 130) reminds us that mentorships can be hierarchical and all modes may not work for everyone. He reframes mentorship expectations to include explicitly reciprocal exchanges which allow for innovation and creative practice to materialize from the productive interactions of many diverse work environments.

Provide mentors and mentees with a Contract or Schedule of Expectations

Orpen (1997) found that perception of mentoring success correlated positively with frequency and quality of mentor interactions, therefore more benefits are to be derived when more meetings take place. The provision of schedules or contracts outlining expectations assist pairs in planning ahead and keeping meetings, even when both parties are busy and supplying a list of conversation starters aids in the pairs getting off on the right foot (Miller, Mallam & Harris, 2009, p.72-75). Lazovsky and Shimoni (2006) examined perceived satisfaction with mentoring agreements and revealed high levels of mutual satisfaction when contracts outlined: rules and procedures – such as responsibilities and behaviours; mentee's goals and objectives - with dates for sessions and parameters of time commitment; and ethical standards of practice –such as confidentiality and closure clauses. Mentors and interns in their study referred to the contract or agreement as

supporting a formal traditional relationship based on a foundation of mutual respect, commitment, authenticity and openness.

3.5. Summary

The literature suggests that mentorship remains a key component in transferring both explicit and tacit knowledge - especially in the workplace- from one to another. While mentoring began decades ago with career-enhancing intentions for the mentee, it rapidly expanded to include psychosocial benefits as well. And although altruism and social interest are frequently cited as the main motivations behind volunteering as mentors, many researchers (Vallejo, 2011 citing Crandall & Harris, 2003; Clary, Ridge, Stukas, Snyder, Copeland, Haugen & Miene, 1998, pp.67) acknowledge benefits to mentors have grown over time to include mentors' own career advantages with increased knowledge, status and satisfaction. Although generational and top down transfers of knowledge remain more widely known it is increasingly accepted that mentoring knowledge can and does transfer in any and all directions to great effect (Zachary, 2009).

4. METHODOLOGY

This study employed a mixed methods concurrent triangulation design. Concurrent triangulation designs are useful if the results of quantitative data and qualitative data are intended to be compared directly to determine their level of convergence or differences (Cresswell, 2009, p. 210). Consideration was given to selecting the most appropriate methodological approach that valued individual opinion for the purpose of initiating a change process within a community leadership development organization (Smith, Bekker and Cheater, 2011).

Drawing on the need to explore and explain experiential outcomes from these three different but related data sources simultaneously, led to the selection of a mixed methods model of data collection which allowed assessment of both a larger sample through an electronic survey (in which quantitative data was emphasized) and two smaller samples through telephone interviews (which emphasized qualitative data collection) (Cresswell, 2009, p. 215).

Sample

As Table 6 below indicates, the larger group (group 1) studied through an electronic survey consisted of mentees previously or currently enrolled in the leadership development program. A second, smaller group (group 2) examined through telephone interviews, was made up of previous and current mentors who volunteered for the leadership development program. A third, small group (group 3) aimed at providing comparative context, was also assessed through telephone interviews and consisted of a small selection of unrelated non-government organizations (NGO) with community mentoring programs. The diagram provides a visual model of the strategy utilized by the researcher to investigate and explain community mentorship experiences and NGO best practices. It is adapted from a model suggested by Cresswell et al (2003), but adds and incorporates a third sample population.

Table 6: Visual Model of Concurrent Triangulation Design indicating three data sets

	E-Survey of 38 Mentees (Group 1)	Interviews of 10 Mentors (Group 2)	Interviews of 3 other NGOs (Group 3)
Timing	concurrent	concurrent	concurrent
Weighting	QUANTITATIVE + qualitative	QUALITATIVE + quantitative	QUALITATIVE
Mixing	Data collection, Data Analysis &	Data collection, Data Analysis &	Data Analysis & Interpretation

	Interpretation	Interpretation	
Data Results Compared	←	→	

Adapted from Cresswell et al (2003) as noted in Cresswell, (2009, p. 209).

An electronic survey was selected to poll the mentees as Burkey, and Kuechler (2002) put forward the strengths of electronic surveys in an organizational context, as compared to surveys of the general population. It makes them particularly appealing and appropriate for collecting personal experiential data. Semi-structured telephone interviews were selected for gathering comparative data from groups two and three in order to elicit more detailed and variable responses to similar questions posed in the electronic survey (Vogt and Paul, 2012).

A schedule for contacting mentors and mentees by email was established and agreed upon between the client and researcher. Mentors received an initial email and a follow up email a week later prompting their participation. The electronic survey for mentees was open online for 25 days with two reminder emails sent during that period. A technical error was discovered in the electronic survey that had not been revealed in the test phase and was reported to the client. A multiple choice button allowed only a single response where multiple responses were intended to be allowed. This information was relayed to the researcher for immediate repair. Two early respondents were required to resubmit their surveys and their originals were stricken from the data record.

Process

As Dillman, Smyth, and Christian (2009) highlight, social exchange theory suggests that respondents will be more inclined to participate if they trust that benefits to them may be realized. To ensure responses and attend to concerns of confidentiality, letters of introduction with invitations to participate were provided by the client to mentees (group 1) and volunteer mentors (group 2). The letter explained that the intent of the research was to evaluate and improve the existing mentorship program in which they had a vested interest (Olson, Smyth and Wood, 2012). This required additional action by potential participants if they wished to complete a survey or agree to an interview (Appendices D & E).

Mentees (group 1) were invited by the client via email to participate in an electronic survey. All mentees available in the client’s 10 year database of 250 were approached. Thirty eight mentees completed the survey, which is a response rate of about 15%.

Volunteer mentors (group 2) were invited by the client via email to participate in a semi-structured interview. All mentors available in the client's 10 year database of about 50 were approached. A total of 10 individuals responded (about a 20% response rate).

Managers of 5 non-government organizations (NGOs) with community mentoring programs were approached by the researcher via telephone and email requesting semi-structured telephone interviews (group 3). Three of the 5 managers contacted agreed to be interviewed by telephone (a 60% response rate). The data collected provided a non-representative sample for local comparative context and garnered insight into mentoring best-practices. The individual program managers employed with other NGOs were unassociated with the client organization.

Instruments

The strategy was to design an electronic survey and interview questions for the three groups as similar as possible so that a comparative analysis could be conducted across instruments with some degree of certainty that differences between responses were due to actual differences and not due to the various modes of data collection employed. (Fowler and Mangione, 1990).

The surveys and interviews contained questions covering an array of topics:

- mentoring outcomes in relation to organizational goals;
- training procedures including needs and desires;
- matching procedures and perceived level of input by participants;
- awareness of transfer of leadership values; and
- recommendations for improvement.

Additionally, internally-directed questions for groups 1 and 2 covered:

- age, gender and life stage at time of involvement;
- matching processes and satisfaction with assigned mentoring pairs;
- rationale for participation, and
- personal satisfaction with the existing program.

Survey questions are included in Appendix D. Interview questions for group 2 are included in Appendix E and questions for group 3 are included in Appendix F.

Group 1 (mentee) survey questions were designed to gather experiential information and suggestions for improvement as well as to assess the program's effectiveness, participants' perceived satisfaction and awareness of leadership values transferred to

them during their mentorship. A total of 18 questions consisting of 11 closed and 7 open-ended formats (variable response) were utilized. This included 12 text boxes which allowed mentees the option to elaborate on their choices. A single-page scroll down format minimized potential navigation difficulties and browser incompatibility issues (Dillman, 2007).

Semi-structured telephone interviews were chosen to gather data from group 2 (mentors) so as not to lead, limit, interrupt or interfere with people's experiential and first-hand accounts. The key objective was to elicit first-hand experiences of those who had taken part in a participatory way in the mentoring program (Beresford & Evans 1999). Thirteen questions were designed to align with group 1 survey questions and to assess mentors' perceived satisfaction with the existing program; desires for changes to the processes; awareness of any transfer of values that may have taken place; as well as recommendations for the program. In total 8 open (variable response) and 5 closed (multiple choice) questions were posed to mentors.

Nine mentor respondents selected telephone interviews, while one elected to submit written responses to the interview questions in an electronic document format. No one selected an in-person interview. During telephone interviews, the researcher took notes as close to verbatim as possible.

Group 3 (other NGOs) were selected by the researcher and contacted directly. Twelve open questions were posed by the researcher to determine organizational best-practices, matching practices, program procedures and parameters. One closed question regarding assessment of the importance of values was also posed.

During group 3 interviews, the researcher took notes as close to verbatim as possible. Two interviewees from group 3 provided access to their organizations' mentorship planning and training documents for the purpose of sharing this information with the client (Appendix G).

Data Analysis

The process of interview transcription and analysis followed the completion of data collection. Topics for sorting fell along a continuum and included criteria such as: *consistency* – how frequently a similar issue was raised; *clarity* – leading to a strong best practice or suggestion; *typical comments* were also the most general; *points of compatibility* indicated alignment of thoughts; and *contrast* provided information for valuable discussion. Finally, themed responses were selected and informed by their clarity, passion and prominence in the interview conversations as well as in written elaboration sections of the survey. Outlier comments were recorded in findings but not

forced into categories. All survey and interview responses were collated and tabulated in this manner.

Internal Documents and Records

Additional data were collected by a review of the organization's mentorship-related documents including previous surveys, annual reports and planning documents from the Board of Directors was conducted. Documents included:

- A mini survey of the 2012 cohort (mentees) regarding pairing satisfaction.
- A mini survey of the 2012 mentors regarding pairing satisfaction.
- Three pages of photocopied training documents directed at mentors.
- Three pages of single-paragraph, self-written mentor biographies intended for distribution to the mentees prior to the selection process.

The internal documents from the organization identified recent participants' perceptions of inconsistently applied training procedures, misunderstanding of the purpose of mentorship and unaddressed mismatched pairings which brought about varied levels of satisfaction (Appendices letter).

Limitations of the Study

The researcher did not have direct access to the client's databases and relied on the client to distribute introduction and invitation emails to groups 1 and 2. Although this is common practice to address concerns of database confidentiality, Moore (2012) suggests that when additional steps are required, it may adversely affect the number of respondents due to increased inconvenience and loss of spontaneity.

The written reply provided by one mentor who elected not to be interviewed, did not allow for follow up questions available in an interview leading to loss of potential information. As this additional data was obtained from the nine individuals who were interviewed this loss is likely to have a minimal effect.

While not considered exhaustive within Greater Victoria, the small sample of three NGO managers with mentoring programs (group 3), were selected by the researcher for their particular structural similarities to the mentoring program being evaluated. Specifically, all three programs were freely accessible to community members, engaged volunteer mentors who were vetted and oriented, and provided clients and employees with time-bound personal development opportunities. None of the programs evaluated were mandatory in any way.

5. FINDINGS

The purpose of this chapter is to present the findings from the three groups queried in the data collection phase: 38 mentees via an electronic survey, 10 volunteer mentors via telephone interviews and 3 NGO managers of other community mentoring programs, also via interviews. It provides a synopsis of the personal views and responses the researcher collected through intentionally similar questions allowing for comparison of data across groups.

Findings are presented within their groups organized by topic of inquiry. Topics of inquiry, although not exact between the three groups, are intentionally similar for comparative purposes. Each group section provides a summation of responses and perceptions for ease of analysis. Survey responses to closed questions are expressed predominantly as percentages with open responses organized by emergent themes or commonalities. Interview responses are reflected as personal experiential accounts, and then organized by emergent themes or commonalities.

The data collected from mentees and mentors reflect one another and are analogous, although coming from different perspectives. Data collected from NGO managers point to best-practices for successful programs which provide strategies to address gaps identified by mentees and mentors.

Mentees Survey Results

Gender and Age of Participants

Of the 38 mentee survey respondents, 32 respondents were female and six were male. The age range of mentees when they enrolled in the LV program from highest to lowest percentage: 39% were between 41 – 50 years of age; 37% were between 31 – 40 years of age; 18% were 51-60 years of age; and 5% were between the ages of 20-30.

Recruitment: Method & Experience

Among mentees enrolled in the program, 52% of the participants were recommended to the program by their supervisor at work. Sixteen percent joined of their own accord to connect and network with the Victoria community. Thirteen percent were recruited by LV staff or a board member. Eleven percent joined after a recommendation from a prior participant, and one individual (2.5%) cited another motivation that came about after being nominated for a Leadership Victoria award.

Over half of mentee participants (53%) had prior experience in a mentoring relationship while the balance (47%) did not. The majority of the prior mentoring relationships (43%) took place in non-profit environments while 29% were in corporate settings. Additionally, 38% reported being mentored in a variety of settings which included informal peer to peer

mentoring, formal government mentoring, friendship and guidance of an employer or supervisor, and community networks within non-profits.

Likelihood of a Future Mentoring Relationship

Based on mentee experiences in the program, 62% replied they would likely pursue another mentoring experience either as a mentee or as a mentor in future. When asked in what context they would pursue another mentoring relationship, 43% said they would likely pursue mentoring in a non-profit context, while 33% indicated a corporate setting would be their choice. Twenty-three percent selected other unidentified contexts as options for future mentoring opportunities. Eighteen percent responded that they were not likely to pursue another mentoring relationship.

Leadership Values: Transfer and Importance

Given options to select multiple leadership values from a list of 9, mentees identified the top three that were transferred to them by their mentors. *Integrity*- described as total honesty and sincerity- was selected as being transferred most often at 61%, with *responsibility* - described as being accountable for one’s actions, occurring 55% of the time. *Empathy*- the action of understanding, being aware of, sensitive to, and experiencing the feelings and thoughts of others was reported as being transferred by 53% of respondents.

The leadership values selected from a list and ranked by mentee respondents (Table 7) appear in descending order of perceived transfer. The remaining values and their percentages of transfer were: *honesty* - 50%; *respect* - 45%; both *fairness* and *ethical decisions*- 37%; *loyalty*- 34%; *self-control*- 26%. Others (5.4%) added the following unlisted values of *self-love*, *kindness and compassion* and *enjoying your role*. Finally, 18.6% relayed that their mentors did not convey any leadership values.

Table 7: Values Transferred to Mentees by their Mentors

VALUE	DEFINITION	
<i>Integrity</i>	Total honesty and sincerity	61%
<i>Responsibility</i>	Being accountable for one’s actions	55%
<i>Empathy</i>	Understanding, being aware of, sensitive to, and experiencing the feelings and thoughts of others	53%
<i>Honesty</i>	Fairness and straightforwardness of conduct	50%
<i>Respect</i>	High or special regard	45%
<i>Fairness</i>	Impartiality and being free from self-interest, prejudice or favouritism	37%
<i>Ethical</i>	Principles of conduct conforming to accepted standards	37%

<i>Decisions</i>		
<i>Loyalty</i>	Faithful to a cause, ideal, custom, institution or product	34%
<i>Self-control</i>	Restraint exercised over one's own impulses, emotions, or desires	26%
<i>No Values</i>	N/A	18.6%

A related question asked for mentees’ perceived importance of the values listed in Table 7 using a 5-point Likert scale ranging from very important, to very unimportant, with a neutral central response of neither important nor unimportant (Table 8). The value selected most (95%), and listed as *very important* was *integrity*, followed by *respect* (90%) and *honesty* (80%). The remaining values were also listed as *very important*: empathy (73%); ethical decisions (70%); responsibility (69%); fairness (62%); self-control (39%), loyalty (26%) and other (43%).

Table 8: Values and their Perceived Importance in Developing Leadership by Mentees

VALUE	Very important	Somewhat important	Neither important Nor unimportant	Somewhat unimportant	Very unimportant
Honesty	80%	12%	0%	8%	0%
Responsibility	69%	27%	0%	0%	4%
Respect	90%	5%	0%	0%	5%
Fairness	62%	21%	12%	0%	4%
Integrity	95%	0%	0%	0%	5%
Ethical Decisions	70%	22%	4%	0%	4%
Empathy	73%	18%	5%	5%	0%
Self-control	39%	52%	4%	0%	4%
Loyalty	26%	43%	17%	4%	9%
Other	43%	29%	0%	0%	29%

Benefits and Suggested Improvements

Mentees’ responses to an open question calling for suggested improvements were divided into five areas listed in Table 9 in descending order of popular selection: *orientation*; *matching process*; *program structure*; *socialization with mentors*; and *timing* related issues. Most suggestions for program improvements pertained to *orientation*, followed closely by calls for improved *matching processes*. Suggestions pertaining to *program structure* were then followed by requests to better engage and socialize with mentors.

Finally, some *timing* and / or scheduling difficulties were mentioned as needing improvement, while few responded that no improvements were needed.

Table 9: Areas of Suggested Program Improvements by Mentees

AREAS OF SUGGESTED IMPROVEMENTS	
Orientation	27.3%
Matching Process	24.2%
Program Structure	21.2%
Socialization with Mentor	12.1%
Timing Related Issues	9.1%
No Improvements Needed	6.1%

Orientation and Support

In assessing whether program mentorship orientation was *sufficient to realize potential benefits*, 34% percent of mentees responded that the orientation received was only *somewhat sufficient*. Twenty-nine percent replied that orientation *was sufficient*, while 23% replied that it was *not sufficient*. Fourteen percent of mentee respondents replied they received no orientation whatsoever. Only two respondents (6%) elaborated on their responses noting that leaders 1) made an effort to explain their understanding of mentoring roles, and 2) did not stress the value of mentorship enough.

Matching and Selection

Nineteen percent of respondents were assigned a mentor and not given a choice, while 81% were given a list to choose from. Not all lists showed the same number of potential mentors. The number from which they selected ranged from three to 30. Of the respondents given choices of mentors, 40% reported receiving their first choice, while 40% reported receiving their second choice. Twenty percent reported receiving a mentor other than their first to third choices.

Meeting Frequency and Quality

Mentees reported large variations in the frequency of meetings with their mentors. While 35% of respondents met with their mentors once a month, and 8% reported meeting once a week, the majority (57%) reported various schedules from once every two weeks to once every two months with one respondent never meeting their mentor and another indicated having met three times in total. A single respondent answered without indicating meeting frequency, stating they met whenever possible. This was tallied among the 57% various schedule responses.

Fifty-nine percent of mentees indicated the time with their mentor *was sufficient*, while 41% indicated they *would have preferred more time together*. Mentees described their time together with mentors: *friendly* (62%); *mutually beneficial* (43%); *professional* (41%); *a natural fit* (35%); *beneficial* (27%); *of little use* (22%); and *awkward* (14%).

Barriers

Forty-five percent of mentees mentioned *time related* barriers such as busy or conflicting schedules, but this number may be reduced by 10% if the *time related* barrier recorded as a *late match or pairing* is removed from the count.

Seventeen percent indicated that their *lack of direction* or understanding about mentorship made it difficult, while the remaining 7 % felt that *lack of fit* or mismatch prevented optimal mentorship. *No barriers* were perceived by 21% of mentee respondents. Additional barriers identified by four respondents included: *communication lacked focus* (2); *relationship lacked closure and ended abruptly* (1); and *opposite gender match made it socially awkward* (1).

Mentor Interviews

Gender and Age of Participants

Of the 10 mentors interviewed, seven were female and three were male. Among mentors, only two age ranges were represented, with eight in the 51-60 range and two in the 41-50 year range. The majority of mentors (six) responded that their age at the time of service was well-suited to be a mentor, although two reported that it was not a good time as they were too busy in their own lives. The two negative responses came from each of the two age ranges represented. Two responders were neutral on the subject

Recruitment: Method, Experience & Rationale

Regarding mentor volunteer recruitment methods used, four noted that they were recruited as volunteers either by an existing LV board member or staff person. Four were approached by a peer either in person or via email and two were already involved in the organization and became mentors when volunteers were needed.

Mentors were asked to convey their main reason for volunteering. Four responded that they wanted to give back to the community, while two gave responses that indicated they wanted to improve the system. The remaining four did not respond.

Leadership Values: Transfer to Mentees

When given the same list provided to mentees and asked to select as many values they believed were transferred to their mentee(s), five mentors indicated they transferred the value of *honesty*. Four believed they transferred the individual values of *responsibility*, *respect* and *integrity* equally to their mentee(s). Three indicated that both *ethical decision*

making and *fairness* were conveyed to their mentee(s), while *empathy* was selected by two mentors and a single mentor selected *self-control*. *Loyalty* was not selected as being important to any mentor respondents. Other values added by mentors were *trust*, *piety*, *forgiveness* and *courage*. Three mentors did not believe they transferred any values.

Benefits and Suggested Improvements

Of a total of 10 mentor respondents, several noted more than one improvement in their answers. Six articulated a desire to have improved opportunities for *socialization*, either with the cohort of mentees or with other mentors. Equally, six mentors mentioned *orientation* needed improvement in order to increase common understanding of expectations and potential outcomes. In addition, two wanted *program structure* changes such as communication and biographies to be unified through clearer language and consistent questions which they believed would lead to better matches. One said that *no improvements* were needed.

Orientation and Support

When asked whether they received sufficient orientation, four stated that mentor orientation was either absent or insufficient, four replied in the positive, stating that orientation to mentoring was sufficient for their purposes. Two mentors did not answer the question.

Mentors were asked if they felt supported by the organization. Nine responses were captured in total: three mentors felt they had been supported; three replied with feelings of not being supported and three indicated they felt somewhat supported, but the organization could do more. Of this latter group of three, suggestions for deeper engagement were made including requests for participation in activities along with mentees as well as with mentors alone.

Eight mentors responded to a question which asked what information they needed as a mentor. Some mentioned more than one type of information. Five responded that they needed to know more about the pressures and expectations on their mentees while enrolled in the program. Three responded that they required more information on being mentors themselves, such as knowing how to actively listen and help mentees strategize toward their personal vision. Three suggestions were made to better prepare the mentees for the experience.

Matching and Selection

Eight mentors responded to the question: “Were you given a choice of mentees or were you assigned one?” Six indicated they were assigned mentees without asking their input, while two were given a choice. Those given a choice voiced their appreciation for having a say in the selection process.

Eight mentors responded when asked: “What would you have preferred?” in relation to the previous question. Three mentors preferred to have choice in who they mentored, while one was satisfied to be assigned their mentee. The additional four mentors did not directly address the question: two respondents wanted networking opportunities with other mentors to learn about their processes; one wanted an option to switch their mentee; and one thought that mentoring in triads (two mentors, one mentee) would better serve the mentees.

When asked: “Did you receive information about your mentee?” nine mentors responded. Seven mentors indicated they had received brief biographies for their mentees, one responded they had not received any information, and one had not yet been assigned a mentee. The following additional information was gleaned from the interviews pertaining to mentee selection. One mentor met with their mentee once before a final selection, one attended a mentor meeting where all biographies were presented to all mentors at once, and one noted that inconsistent information in the biographies made selection difficult.

Local NGOs with Community Mentoring Programs Interviews

Three managers of community mentoring programs answered 12 questions with the intention of garnering best practices pertaining to orientation and training practices, policies and procedures and importance of identified leadership values. Each program examined used two-person mentoring relationships, or dyads.

Rationale

When asked about their organization’s rationale for having a formal mentorship program, common objectives emerged from all three respondents. Of greatest importance to each manager was the development of individuals (described as clients) enrolled in the program. This development was either professional or personal in nature, and sometimes involved both. This was primarily achieved through pairing individuals who were transitioning into new or unfamiliar environments with volunteer mentors in prolonged supportive relationships.

Common objectives were to reduce isolation over the specified period of time, to increase social interaction, build functional networks and to transfer practical skills to mentees. In

all programs described in the interviews, mentees were responsible for taking the initiative to analyze their needs and direct their personal mentorship learning. Mentors and program support staff (managers) had the additional responsibility to be available to mentees and to assist them in achieving their goals as best possible. One manager reported that an additional objective was to increase staff retention.

Number of Pairs and Cycle

When asked how many mentoring pairs were managed over a cycle of a year, two managers were able to identify exact annual figures which ranged from 20 to 28 pairs annually, while another was only able to say that over the past 10 years a total of 200 people had gone through their program - meaning 100 pairs, or an average of 10 pairs per cycle.

Each program provided one mentoring cycle in a single calendar year, but terms of the mentorships varied from six months to a year. Two programs began each September, while the other organization offered continual intake to remain flexible and responsive to client needs. Two managers stated that some matches were difficult to make from their pool of mentors, which prolonged the selection process, sometimes by up to two months. The other organization required mentees to identify and approach their own mentor, meaning their terms started only once that relationship was established. Each interviewee said that relationships often continued after the formal term of mentorship had ended, although two managers stated that they do so unsupported by staff.

Successful Aspects

When the NGO managers were asked to identify successful or changed aspects of their mentoring programs they felt that program evaluations conducted either during and/or at the end of the terms indicated that objectives had been achieved. Evaluations took the form of questionnaires that asked participants to select a level of satisfaction, neutrality or dissatisfaction to questions about the mentoring relationship. There were also options to provide specific program feedback. Two managers spoke about the rapid decrease in feelings of isolation for the mentees, allowing them to build confidence and reach out beyond the mentoring relationship.

One manager identified success anecdotally by learning of mentees that had received promotions within the organization, while other mentees completed their terms with a desire to become mentors themselves, implying a positive outcome. An indirect recruitment strategy was noted by two managers as coming from within the program itself. Those who had experienced positive outcomes as mentees frequently volunteered as mentors at a later date.

Each organization provided teams with a pre-determined schedule of meeting expectations which included optional monthly group gatherings with relevant topics of discussion. These schedules allowed all participants in the programs to plan their calendars in advance, which were reported as minimizing date conflicts. Each of the group gatherings had social aspects including the sharing of a meal together, and allowed for mentees and mentors to interact with others in their respective cohorts.

Managers of each organization reported that they had faced challenges and made changes to their programs over time. Two managers noted internal challenges such as responding to complaints or suggestions which participants revealed through the evaluation process, while one faced an external challenge of adjusting to meet shifting funding requirements which necessitated an expansion of their target population of mentees. In all interviews, managers felt that programs had improved because more participants were satisfied with outcomes.

One organization trying to manage a constant overage of mentors overhauled their entire program to make better use of the (mostly younger) mentors as volunteers in other program areas. The decision to change to a volunteer training program with a mentoring component kept volunteers engaged doing other duties while waiting for mentor pairing.

One other organization made a change by introducing previous mentoring pairs to the new cohort at the start of each new cycle. By holding a group question and answer session, they reported having positive results in terms of mentees and new mentors having a better idea of what was expected of their time together.

Importance of Values in Mentorship and Leadership

When asked to assess the same list of nine values provided to the mentees and the mentors and to indicate whether or not they were important to leadership and mentorship, NGO managers all said that the complete list of values was important. However, the top value deemed of utmost importance was *empathy*, followed by *honesty*, *respect* and *integrity*. *Courage*, although not listed, was added by two respondents as being especially important to mentorship.

Policies and Procedures: Matching of Mentors

The NGOs shared their policies and practices regarding building their unique pool of mentors. Two programs used advertisements in local papers and at volunteer centres to recruit prospective mentors from the general public, while the third was less reliant on advertisements as their program was built to suit the stated needs of mentees within a closed workplace. In this instance, the manager searched for a suitable staff to work with a particular mentee based on that mentee's needs.

In all cases prospective mentors were interviewed by the program manager to determine their mentoring readiness. Each manager described the use of intuition as the primary tool in making a match. This process was described as both investigative and intuitive, with final decisions ultimately left in the hands of one individual. Two managers expressed a heavy feeling of responsibility that came with the duty, but all 3 expressed the need to find the right fit and took adequate time to do it, even allowing mentees to wait until suitable matches could be found.

Two programs used personal references to vet prospective mentors, while the third did not feel it was necessary within the closed context of the workplace environment (as all mentors were also employees). Mentoring pairs followed various models. One interviewee emphasized that it was not a peer mentoring program, and worked hard to provide inexperienced mentees with mentors with plentiful lived experiences to pass along. This organization worked alongside other agencies that offered peer support and counselling. In fact, it was a requirement that mentees in this program were otherwise supported, recognizing that mentors were not equipped to be responsible for all aspects of a mentee's development. One manager stated that the organization fostered omni-directional mentoring relationships, but acknowledged that the majority of pairs made were traditional in nature.

Of special note was the practice of one program that reserved space for at least one mentoring pair annually for members of a designated group as defined by equity policies in the work place. In this same program, priority was given to mentees that are in regular appointments, not temporary assignments.

Mentor Training Procedures

Mentor training took different approaches across three NGOs with some similarities. All programs were self-directed by the mentee and did not mandate the mentor to do, say or plan anything. The mentees lead the process and are responsible for taking the initiative.

One organization provided mentors with a formal training binder for their reference. The binder was seen as particularly useful in ensuring information given was consistent, especially as orientations were predominantly carried out one on one. The second organization only trained mentors and provided them with some useful reference materials at an initial session at the beginning of the cycle. The third organization first trained mentors in a group environment, then once paired, received refresher training together with their mentees in a group environment.

The organization with the continual intake policy trained mentors through regular monthly group meetings in an evening workshop format. Mentors in this program know they can bring issues or ideas forward to troubleshoot with other mentors at this time. This organization trained mentors one on one only as needed and required signed confidentiality agreements and two levels of criminal record checks before being approved as mentors in the program.

Another organization built a curriculum binder for mentors providing key information on mentees' additional support issues received through social services. Supplementary information on honing communication skills, understanding loss and mending relationships are provided, as they have been identified as frequently required. All of this organization's training of mentors happens in a group training environment over an eight week period. To reduce any notion of hierarchy, this organization tries to emphasize equality in the mentoring partnership by calling mentees "mentoring partners".

The third NGO trained its mentors in stages, first through an informal one on one conversation and then by sending a formal package of training material before a pair orientation session is scheduled. Mentor training material is reinforced throughout the duration of the program via monthly luncheon sessions for mentoring pairs. Although more work for the manager, the manager felt that this approach proved to be more effective for the workplace based program than a single group training session which was difficult to schedule.

Mentee Preparation and Orientation

NGOs opted to prepare mentees to varying degrees. One organization did not train mentees and directed all efforts of training toward supporting the mentor. An interview and assessment to determine their readiness takes place in the form of a coffee visit, although mentees came to them through social service agencies that had already assessed their clients as being ready for a mentoring relationship. Program managers check in with the pairs periodically throughout the term, and again at the end to ensure needs are being met. This organization did not offer group gatherings for mentoring pairs.

The second organization trained their mentees indirectly and incrementally through short educational sessions at monthly social gathering where pairs are encouraged to attend together. There is always a shared meal, a shared space and problems or issues are discussed all together. Meetings are prescheduled so pairs can plan to attend together, and topics of discussion are predetermined, but can be changed to address emergent issues.

The third organization oriented the mentoring pair together at once, using a manual similar to the mentors' materials, but not in a group setting. Here, orientation begins for the mentee at the first interview to help them begin to understand what is expected. It includes lessons learned from previous cohort participants and planning tips for scheduling. An early group luncheon also offered a panel discussion with previous mentoring pair(s) to discuss personal experiences.

Summary

Examination of key stakeholder data revealed general satisfaction with the LV mentoring experience and indicated the objectives of the program are being met. Areas needing improvement were exposed and consistent responses between study groups were brought forward. Interviews with other NGOs revealed practices which lead to successful outcomes for their respective programs and were found to be supportive while not overly prescriptive of mentorship pairings.

With respect to values there was great similarity between all three groups regarding which values were considered most important to mentorship. A question posed to mentees about values received revealed some alignment with mentors' perceptions of having transferred specific values.

A minimal level of negative feedback was received toward the program, but it is important to note that this was received alongside suggested improvements which addressed the same concerns. Although opposite examples of great satisfaction were recorded, they were by no means in the majority.

Essentially, mentors deemed their services to be underutilized, and perceived themselves as disconnected from the larger program while mentees wanted to know more about mentorship's potential to their development and tools to assist them in facing mostly time-based challenges.

6. DISCUSSION

Leadership Victoria's Leadership Development program is charged with cultivating community minded and engaged leaders who are prepared to address both simple and complex societal issues. One strategy to achieve this aim is through mentorship - pairing cohort participants (mentees) with proven community leaders (mentors) in hopes of transferring leadership values and abilities.

The intent of this chapter is to relate the findings from the survey and two interviews to the literature examined in Chapter 3 in consideration of the research questions and project objectives. Key findings will be discussed in context of the evolving practice of formal mentorship programs in particular.

Five key findings surfaced from the comparison of data and literature examined. These pertained to: participant satisfaction; training and orientation; socialization; program support; and the transfer of values. An additional heading captures other data which may be relevant to the client. Each finding has several salient sub-points which are discussed individually under the topic heading. The findings are interrelated and when joined together with common mentoring practices reflected in the literature, create a framework for the transfer of knowledge in context of community leadership development.

6.1 Participant Satisfaction

A moderately high degree of satisfaction with the mentorship program was noted by both mentees and mentors. Among the factors contributing to the satisfaction was the opportunity to have input in the matching process. There was considerable alignment between mentee and mentor respondents pertaining to preferences when being paired with a mentee or mentor. In either case, each side of the dyad preferred to be given a choice, as this appeared to increase their investment in the relationship. Dunn's (2009, UNM, p. 27) research emphasized the need for making choices of mentoring partners based on social identity congruence and complementarity in order to build more diverse developmental networks, because successful mentorships require some common ground, most notably shared values on which a relationship of trust can build (Mertz, 2004, p. 555; Fleig-Palmer & Schoorman, 2011, p. 336-7).

In this research, stakeholder satisfaction did not appear dependent on whether or not their choice of mentoring partner was actually received, but rather on whether or not participants felt they had been consulted. Allen, Poteet & Russell (2000) found that mentors made their selections based on a mentee's perceived potential and perceived need for help. This same study showed that female mentors more regularly selected mentees with a higher level of perceived ability, and less frequently those perceived as needing assistance, indicating a reluctance to commit to a task perceived to be more

difficult, although male mentors made their selections considering both factors. Neither of these factors was mentioned by mentor respondents in this research, yet all individuals who did not receive their first or second choices, still felt that their opinions had been considered when managers had made final pairing selections.

The literature consistently shows that strong self-awareness is fundamental to a mentee's ability to integrate him or herself seamlessly into the systems of a given community, whether that community is corporate, academic or societal. It would seem logical then, that the mentoring component of the LV program would positively enhance the capacities of participants' confidence, self-awareness and skill set, but findings in this report indicate this expectation is heavily dependent upon the preparatory work that goes into the early training of the parties involved - prior to the matching process. It also shows that if success is to be a consistent outcome, it cannot be left to chance and goodwill alone. The probability of a mentee's perceived successful engagement with a mentor is directly related to their ability to find practical and applicable value in the relationship including inspiration, self-confidence, curiosity, or as shift in point of view. Likewise, a mentor's perceived satisfaction appears related to their feelings of functional usefulness, and their connectedness with the greater purpose of the organization.

Matching

Several suggestions for improved matching processes were provided by mentees and mentors including the creation of biography templates that answered specific and consistent questions for easier comparisons made by program managers or committees. The literature supports a variety of matching methodologies, but all lead toward the selection of pairs or clusters that are more closely aligned or congruent in deep level beliefs and values, as well as surface-level salient characteristics such as culture, gender or personality types.

The literature supports the effort to find ways to assure congruence (Dunn, 2009, UNM; Blank, Frazzini & Marshall, 2008, UNM, p. 4; Miller, Mallam & Harris, 2009, UNM , p.73), proximity (Harvey, 2012), and shared beliefs and values (Mertz, 2004, p. 555; Pfleeger & Mertz, 1995, p.73) between mentors and mentees, but the current practice in Leadership Victoria of soliciting undirected and self-written biographies for matching purposes allows for very little cross comparison. Participants observed that some biographies are very brief and factual with little additional content while others are more like advertisements of professional skills. While the literature supports the notion that higher degrees of similarity or proximity correlate with more positive outcomes - psychosocial and career related - it did not reveal insight to improve the biography collection process.

The use of trait assessment tools to match along personality types was raised by more than one mentor, and may prove to be useful especially as the leadership development program already employs the Myers-Briggs type indicator (MBTI) with new mentees early in the process as a way of helping them become more self-aware. These can be managed online or in person, but the highly confidential information should be well protected and respected if it is to be used for matching purposes (Blank, Frazzini & Marshall, UNM, 2008, p. 4; Miller, Mallam & Harris, UNM, 2009, p.73). Furthering this point of using typing tools Miller (2011, UNM, p. 132-137) purports the use of multiple intelligence quotients including social, emotional and cultural to build more meaningful and diverse mentoring relationships.

The idea of matching surface and deep level characteristics may be important to consider when assigning a mentor, including the careful consideration when creating cross-gender and cross-racial pairings (Dreher & Cox, 1996; Dreher & Ash, 1990), as outcomes appear related to the level of connection felt between a mentee and mentor (Dunn, 2009, UNM, p.27). This may be seen as minimally relevant in this research as only two mentees raised a related concern. Although the literature strongly suggests that certain matching practices directly enhance career-related benefits (such as white male mentors adding most career-related benefits to protégés in work environments), as the objective of the community leadership development program is not necessarily meant to be career-focused, managers may wish to disregard these practices especially as this would further limit the mentoring pool and go against the program's fundamental principle of inclusion and accessibility.

Frequency and Nature of Relationship

Harvey (2012) showed that proximity increases satisfaction and enhances transfer of knowledge in mentoring pairs. Harvey (2012, p. 403) citing Boschma (2005) noted that proximity can be cognitive, organizational, institutional, social and geographical as knowledge flows more fluidly when an individual's relationship is socially entrenched. This social connection is tied to the degree of trust and reciprocity between mentees and mentors, and may explain the rationale behind requests for more shared socialization opportunities. Fleig-Palmer and Schoorman (2011, p.336-7) prove this point in their work studying trust as a moderator in mentoring knowledge transfer, where reported low levels of trust amounted to lower levels of knowledge being transferred. The presence of trust was found to enhance the deep level conversations needed to elicit a mentor's willingness to share knowledge – especially if they believed the knowledge would be put to good use. Although trust itself was not a focus of this research, no comments were received concerning trust issues.

Participants noted a factor affecting satisfaction was the frequency of meetings and the nature of the relationships. While most mentoring pairs met at least once per month, others met less frequently with a few meeting only once. A common response was that both parties had hoped to be able to meet more frequently, but that time and conflicting schedules made this difficult. This resulted in less than satisfactory experiences for both mentors and mentees. This is not surprising as dissatisfaction on a mentee's part may be the result of not having put enough early and consistent effort into establishing the relationship. Likewise, mentors may not have assisted an unfamiliar mentee through a process toward understanding, choosing instead to wait for the mentee to take the initiative. These points will be discussed in greater detail under the separate headings of training and support.

Finally, some participants suggested that matches be assigned based on a mentee's articulated developmental needs with a mentor known to have strengths in these areas. Literature supports this notion as being beneficial to the process of finding alignment within dyads (Zachary, 2000; Searby, 2008, UNM, p.35). Yet it also necessitates a mentee to critically self-assess their needs early or even before entering the program. At present, this is not addressed until the program is underway, and may not occur at all if a mentee remains unprompted to be self-reflective. Zachary (2000) and Searby (2011, UNM, p.145-148) emphasize the need for a mentee to adequately prepare for mentorship. On the opposite side of the dyad, a prospective mentor may prepare by considering what they have to offer a mentee, and what they may hope to gain from the relationship themselves (Owens & Patton, 2003).

6.2 Training and Orientation

Grossman Baldwin & Tierney's (1998) research with Big Brothers, Big Sisters concluded that infrastructural support and training is increasingly necessary to have lasting positive impacts. The literature consistently reveals that training has not been a priority of the past (Vallejo Calvery, 2011, UNM, p.66-70, citing Rhodes, 2008).

The research data from mentees and mentors indicated widespread confusion concerning the purposes of mentoring, although mentors were less apt to identify their own personal knowledge deficits in this regard. External NGO managers were clear on the type of mentorship used in their programs, although specific definitions were neither requested nor provided.

Orientation was predominantly seen as insufficient to realize the full potential of mentorship. Both mentees and mentors stated that mentees were unprepared for the mentorship process, and unaware of the expectation to take the initiative in the relationship. It is important to note that mentees were speaking from the perspective of

hindsight, having become aware of what was intended or could have been only after the relationship ended. Mentors more frequently felt prepared to mentor, but most had prior mentoring experience to draw upon.

Conference proceedings from the University of New Mexico indicate that formal mentoring programs are moving toward more contemporary approaches to training including all-online, self-guided processes which reduce costs and number of hours taken away from the workplace. At the US Geological Survey (USGS), online training modules are completed ahead of time and at the learner's own pace (Miller, Mallam & Harris, 2009, UNM, p.72-75) to ensure consistency of knowledge prior to commencing a mentorship.

Miller et al (2009) disclosed how the USGS changed from a traditional top-down formal program to a mixed contemporary model using mentoring circles – also known as clusters- and groups, acknowledging that a mentee can benefit from more than one mentor, and that some mentors could work effectively with more than one mentee if the goals of the mentees were shared. The success of this particular multi-faceted national program has been tied to the emphasis on knowing mentee goals and objectives, and making greater effort to find the right matches rather than forcing a fit. Some mentorships at the USGS moved entirely online as best matches were not always co-located, and the objective of the national mentoring program was to transfer knowledge from soon-to-be retiring professionals to newer employees as quickly as possible.

Clapp (2010 & 2011) described how omni-directional mentorship philosophy in cultural organizations made for enhanced knowledge transfer and bridged generational gaps accepting that knowledge can and does move in any and all directions, not just top-down. Although not defined as omni-directional, the success of the USGS program appears to be its commitment to building a consultative mentoring culture within their large national organization. USGS consistently makes program adaptations based on valuable feedback of its participants at any level. Clapp's example is likely an informal practice. He supports the notion of ever-changing or swapping roles of mentors and mentees, allowing for a thoughtful and nimble work environment where people can all be innovative and play to their strengths.

External managers of mentoring programs shared their best-practices for training and development. One institution trained mentees and mentors separately as well as in a shared group environment which, to their view, ensured consistency of understandings and objectives, as well as opportunities for posing questions in a private environment. To this end, they supplied both mentors and mentees with guidebooks to help with the process. In all three NGO examples, implicit orientation and training opportunities took place during regularly scheduled (monthly) group socializations or meetings over food.

These luncheons also provided participants with socialization among individuals they may not otherwise get to meet in their everyday lives, allowing them to expand their network circles. Two other agencies formally trained only their mentors in a multiple day workshop environment. This was seen as particularly important to agencies working with more vulnerable populations where specialized training in conflict resolution and risk assessment may be more necessary than in an institutional work setting.

6.3 Socialization

Communication and behavioural observation is crucial to establishing trust in a mentoring relationship. Mentees reported a desire to socialize more frequently with the mentors, while mentors reported a desire to socialize more regularly amongst themselves, but also wanted to be more involved in and / or aware of the cohort's annual cycle of activities and learning days. Socialization adds to an individual's ability to feel adjusted and part of a larger group. The desire of mentees to interact with their mentors outside of formal meetings allows them to observe mentors as role models and networkers, and glean comparative information and social cues from the social environment.

Mentors' desire to meet amongst themselves is both functionally and socially motivated in that it builds their own social network (or community of practice) and provides opportunities for peer to peer mentoring to take place. More discussion on this topic can be found in the next section. A mentor's desire to know a mentee's programmatic obligations and activities is also functional in that mentors should be aware of the external pressures at different junctures during leadership development. This information may already be shared in dyads through conversation with a particularly communicative mentee, but otherwise may go unremarked or unnoticed in a relationship as mentors are not automatically involved or invited into a mentee's development or project world. In any case, it must be emphasized that it is the mentee who needs to take responsibility for their development and initiate the mentoring relationship.

Adding to the point of the importance of ensuring ample opportunity for socialization are data from two external managers whose programs have as one of their objectives, the re-socialization of individuals who have been largely marginalized in the community. Regular meetings provide these mentees opportunity to learn healthy social cues in a safe and structured environment (Baldwin et al, 1998). In many instances, including two external NGO's mentoring programs, mentee training occurs implicitly, through observation and participation in shared experiences (McNichols, 2010, p.24-37).

6.4 Support

The literature acknowledges the necessity and importance of managers or supervisors overseeing mentoring programs. Whether it is making pairing decisions, orienting new

comers or maintaining contact with existing dyads or clusters, the manager needs to be seen as neutral and accessible to both the mentee and the mentor – a place to come for advice if a concern arises. A manager should also consider that it is feasible for an individual to be both a mentor and mentee themselves – especially in such a learning-oriented community of practice or workplace (Clapp, 2011, UNM, p.126-131). Some programs allow for a single mentor to work with several mentees at the same time, but not necessarily in a group setting. Although this latter approach appears less than ideal, it requires additional training and support to ensure needs of all parties were being met (Miller, Mallam & Harris, 2009, UNM, p.72-75).

Mentors sought more opportunities to socialize with their peers as a means of support and co-learning. Although mentors were interested in participating in the cohort's learning days, they were more interested in being informed of the cohort's current activities and pressures on their busy schedules – to know where their mentees were in the process. This may also lay the foundation for the development of a mentoring community of practice. NGO's best practices demonstrated that gatherings held exclusively for their mentors provided the most support for their volunteers' learning and sharing opportunities. The literature reinforced the notion of supporting and caring for mentors as they are key conduits of knowledge in the mentoring process. Vallejo (2011, p.70) cites Larose who found that mentor self-efficacy rose with continued support and opportunities where mentors can discuss their experiences and reinforce resiliency.

Information

Managers are the primary source of training information for dyads at least in so much as they disseminate information and provide either prescheduled meeting dates and agendas or tools like conversation starters and activities to explore and share for the duration of the relationship. This requires a light touch since mentorship should not feel to participants like classroom training, but rather should be heavily invested in social connection and building of trust. Even when training is removed from the manager's responsibility, such as in online training modules, it remains the manager's duty to encourage participants to complete the training, and get down to the business of mentoring, no matter the framework employed. It is in the best interest of the organization to select these people carefully. Like a matchmaker, they require both intuitive people skills and an ability to remain organized while focussing on the objectives of the mentorships. Managers are also responsible for the collection and reporting out of program data, such as information gleaned during check-ins and in at exit interviews. This valuable data assists managers and others responsible in creating a more deeply-engaged and meaningful mentorship experience. Thorough reviews of existing practices should

take place regularly to ensure program relevancy and to keep up-to-date on new developments, trends and best practices.

Useful Tools

Data collected by the NGO managers cite tools which are useful to the process including: a pre-determined meeting schedule for the duration of the supported mentorship time; a list of suggested conversation starters addressing common topics within mentoring relationships; and a few planned check-ins by managers.

The literature pertaining to several formal mentoring programs indicated that using prescriptive programming or providing suggestions for mentor/ mentee interactions were most helpful in quickly orienting participants to understand expectations of the mentorship. An option is to provide suggested readings for both mentees and mentors including descriptions of various modes and types to broaden a participant's existing understanding of mentorship's possibilities (Mangan, 2013, p.39-41). Clear expectations need to be known by both parties. Formal programs that offer their mentoring pairs a schedule of expectations at the start of the relationship, noted that pairs were able to meet more consistently and network together with other pairs in pre-planned social engagements due to the avoidance of scheduling conflicts (Skaggs Buckel, 2009, UNM, p.196-201).

Honesty, trust and commitment are required by both parties. Trust was discussed as a moderator to successful knowledge transfer within mentoring relationships by Fleig-Palmer & Schoorman (2011, p. 336) who indicated that a greater degree of trust lead to greater levels of knowledge being transferred.

Several community-based mentoring programs, where the expectation of mentorship knowledge was comparatively low, provided a list of suggested conversation starters and scheduling suggestions to help get things moving (Skaggs Buckel, 2009, UNM, p.196-202). For some, this information is collated into a guide or manual for the dyad's quick reference or the manager may be contacted for clarification if manuals do not exist.

Dubois, Holloway, Valentine and Cooper's 2002 meta-analysis of 55 studies in search of impactful aspects of mentoring found that across programs, no single feature or use of a specific set of best practices was responsible for a program's degree of perceived success. Rather, they determined that a program modelled on both theory and empirical data remained valuable to its constituents. This highlights the need for an organization to remain nimble and aware of its stakeholders' differing needs.

Encourage a Community of Practice

In addition to the above tools, mentor-only meetings were held by all NGOs to facilitate shared practice, trouble shoot issues within dyads and to find better ways to navigate a particularly sensitive situation and provide learning opportunities (peer to peer mentorship). All of these add value to the NGOs' mentor experience, and lead this researcher to confirm that mentors volunteer for more than altruistic reasons. Formally or informally strengthening a mentoring network provides mentors with an ad hoc community of practice - a supportive and social connection of individuals with shared goals and interests. This potentially builds a pool of trained community mentors to draw upon in future and may serve more than the leadership development organization itself.

Mentors also identified the need for more information on how to be an effective mentor. Owens & Patton's (2003) summary of characteristics and behaviours could also assist mentors in sharing knowledge and skills such as active listening, cultural awareness (Blake Beard, 2009), or how to start difficult conversations. This request for skill-specific knowledge is separate from mentoring orientation, generally, and would best be discussed amongst a group of mentors.

6.5 Values Transfer and Importance

An extensive review of mentoring literature did not reveal insights regarding the transfer of specific values through mentorship. However, when values are cited in the literature, sharing of common values and beliefs for pairing congruence are mentioned repeatedly as useful in the transfer of corporate value systems or cultures and role-modelling of behaviours (Kram, 2005).

In contrast, and given a list of 9 pre-selected values to choose from, all groups surveyed ranked their importance in descending order. The following Table 10 indicates the top five responses from each of the three groups studied. When compared across all three groups, integrity, honesty and respect were the three consistently selected values. The values reported as being received by mentees did not rank in identical order with those thought to be transferred by the mentors, but the study did not query matched mentoring pairs which may account for the inconsistency. The important aspect here is to know that values were perceived to be transferred and received during the mentoring experience. It is a good indicator of success that mentors and mentees agreed on the transfer of values. This is especially significant as the values transferred most within dyads were among the values deemed most important to mentorship as selected by local NGOs.

Table 10: Importance of Values by Groups

	#1	#2	#3	#4	#5
Mentees reported receiving these values.	integrity	responsibility	empathy	honesty	respect
Mentees ranked these values in order of importance	integrity	respect	honesty	empathy	ethical decisions
Mentors believed they transferred these values.	honesty	responsibility, respect and integrity	fairness	ethical decisions	others
NGOs listed these values as most important.	empathy	honesty	respect	integrity	courage

6.6 Other

Other salient information was gathered in the data collection phase pertaining to age, recruitment, experience, barriers and suggested improvements which may assist the organization in developing its program.

Age

In the Leadership Victoria Leadership development program, seventy six percent of mentee participants who responded to the survey were between the ages of thirty one and fifty years of age, notably higher than the ages of mentees in each of the three local NGOs who targeted young mothers, street-engaged (mostly) young adults. Eighty percent of mentors interviewed were between the ages of 51-60 years old – at least a decade older than their assigned or selected mentees. Levinson et al (1978, p. 334) outlined that mentors should ideally be 7 to 12 years more senior than their protégés. Further, eighty percent of mentors indicated their age at the time of service was well-suited to being a mentor, while 20% noted that it was not a good age as they were too busy in their own lives. Regardless, this age differential reveals a program design choice, whether conscious or otherwise, that is more traditional in approach than many other contemporary programs, and certainly different than that of its local mentoring program counterparts. However, it is important to note that age was not raised by either group as a barrier, implying this aspect of matches is not a program detriment.

Lunsford (2009, UNM, p.207) cites Erikson’s (1963) psychological theory of the eight stages of man and applies them to mentoring stages. She posited that mentoring

programs to role-model youth involve those in stages IV or V “school age or adolescence”, and programs in academic environments focus on people in stages V or VI, “adolescence or young adulthood”. While Lunsford cites at-work mentoring programs predominantly targeting stage VI or individuals in young adulthood, this research revealed that mentee participants in this community mentoring program were, by Lunsford’s view, in mid-late adulthood or stage VII – and who theoretically are at the stage of examining crises of either generativity or stagnation. This would correspond with the program’s goal to build community-engaged leaders who are called into action and give back to community. Based on context of the programs studied in the literature – post-secondary students, recent graduates and new recruits to the workforce - it has been assumed that mentees are generally younger than those in our research report. If following strictly traditional modes, this implies that more senior mentors must come from either stage VII or VIII, mid-late adulthood or old age. The research confirms this to be an accurate assessment. Notionally, this later than usual exposure and involvement in mentoring could have a positive impact on outcomes as this researcher presumes that, although not universally true, increased life experience that comes with age may better prepare mentees to accept the challenges which mentorship affords.

Recruitment

Over half of the mentee recruits were recommended to the program through their supervisors at work (52%), indicating a degree of success. Numbers of mentees recruited through external advertisements were only marginally higher (16%) than those recruited by word-of-mouth of either Board or Staff (13%) or previous participants (11%), indicating that more efforts could be made in this regard. Encouraging both Board and Alumni to assume some responsibility for recruitment is important to pursue, as together these two ways of recruitment made up twenty-four percent of mentee respondents. These figures differed from the local NGOs interviewed who populated their programs in various ways: mentors being referred exclusively from other social service agencies, by word of mouth or self-directed through online university intranet channels.

Blank, Frazzini and Marshall (2008, UNM, p.1-14) indicate that multiple mentoring initiatives build program longevity and maintain mentor bases through word-of-mouth, direct mailings and web-based advertising. The data indicated that mentor recruitment was accomplished with a more personal, one on one approach. Eighty percent of respondents were recruited by existing board or staff members including half of these who were approached by existing mentors in the program (but neither staff nor board). Others had been involved in the program as mentees and returned to mentor others. Further, when asked about rationale for becoming a mentor, 66 percent stated their reason was a desire to give back to the community, while the balance of respondents

became involved to improve the system. While altruism and social interest are frequently cited as the main motivations behind volunteering (Vallejo, 2011, UNM citing Crandall & Harris, 2003; and Clary, Ridge, Stukas, Snyder, Copeland, Haugen & Miene, 1998, p.67), the mentoring literature did not reveal other mentors' desires to improve systems. It is noteworthy to mention that no mentors interviewed came to the program through external advertisements in the paper or volunteer agencies, bringing into question the effectiveness of this method. It therefore remains feasible only if this method is at very low to no cost to the organization.

This trend to advertise to find mentors was reflected by two of the three NGO managers who used the services of community volunteer networks to seek out mentors. The other NGO recruited individuals only from within the institution to suit a mentee's direct learning needs.

Experience

Fifty-three percent of mentees surveyed had been in a prior mentoring relationship, mostly in non-profit organizations. Sixty-two percent said they would pursue a future mentoring relationship either as a mentee or a mentor, indicating an overall positive experience, while eighteen percent indicated they would not pursue another mentoring relationship in future. Mentors were not asked about their prior mentoring experiences, although Grossman et al (1998) indicate that prior mentoring experience predicts higher levels of commitment due to increased self-efficacy to the tasks of mentoring.

Barriers

Mentees reported three main barriers to effective mentorship with the most significant one being time-related difficulties such as conflicting schedules. Other barriers were their own lack of direction /preparedness and simple mismatches. The literature did not directly address time-related concerns as a barrier. However literature on lack of preparedness for mentorship can be alleviated in one of two ways; through adequate orientation (O'Regan, 2011) and/or through personal work to self-prepare (Zachary, 2009; Searby, 2008; Searby & Tripses, 2007).

As some mentors surveyed in reported the need for mentees to be more prepared for the process, Searby and Tripes' (2006, p. 179-195) list of knowledge, skills and dispositions may be conducive to effective mentoring relationships. This would assist in meeting Zachary's (2000) call for self-directed critical reflection to determine what particular type of mentor they need.

Benefits and Suggested Improvements

Kram (1983) identified five principal mentoring functions which remain relevant to mentorship, but predominantly within the context of the workplace. Although not directly

addressed in this research, coaching, sponsorship, exposure and visibility, challenging assignments, and protection were not seen to apply within the community context examined. Psychosocial, rather than career-related benefits emerged from the data collected. Mentor responses alluded to functions which mirrored Kram's (1983) list of psychosocial functions of mentors including role modeling, counseling, acceptance-and-confirmation, and friendship, as well as Kram & Isabella's (1985) list of psychosocial benefits to mentors: including respect from peers, personal satisfaction and confirmation and support from the mentee. Mentee psychosocial benefits included increased confidence and self-awareness (Kram, 1983; Kram, 1985) were also reflected in the literature. Neither mentees nor mentors mentioned career-related outcomes to their mentorship, not surprising as this community program was not within a work environment.

Within the five areas of improvement, orientation was most consistently mentioned by both groups. Among mentees, only a third replied that orientation was sufficient to realize potential benefits, while half of mentor respondents felt that their orientation had been sufficient. Importantly, the other half responded that orientation (including training) had been either absent or insufficient. The literature reveals the importance of early and consistent training and orientation to (especially the first) mentoring experience by either party. Absence of or inconsistently applied training leads to miscommunications and misunderstandings of the roles and expectations of mentoring while training all parties leads to greater success (Cameron, Dutton & Quinn, 2009, p. 1-31).

Summary

The literature and shared practices from local NGOs demonstrate several successful approaches to achieving desirable outcomes, but each appears tied to and dependent upon the specific intention of the program design as Kram suggests (2004). Clearly, there is no 'one size fits all' approach to community mentoring programs, (Clutterbuck, 2005; Clapp, 2010). Rather, building a deeply experienced and varied pool of mentors from which to draw, and then working with mentees to help them discover what type of benefit they seek from the experience, will assist the program managers in creating more targeted, and therefore more meaningful matches that enhance the experience, rather than draw down on all participants' valuable time.

Scholarly discourse and shared experiential data shows that newer ways of transferring knowledge are gaining traction such as peer to peer, cluster, bottom-up and omni-directional mentoring. In circles and sectors once thought to be impenetrable by those previously uninvited into mentoring relationships, mentoring has become accessible and part of common practice.

Best practices have emerged across modalities which assist participants on either side of the learning relationship to realize mentorship's full potential. These include: assessing readiness to be in a mentoring relationship by preparing adequately; using character trait and goal alignment techniques grounded in theory and practice to aid in creation of successful matches; training all participants to achieve consistent understanding of mentorship's possibilities; selecting mentoring types based on desired outcomes; and providing schedules /contracts which outline mutual commitments, meeting expectations and closure dates.

LV participants may not all be fully equipped to single-handedly tackle complex societal problems upon graduating the LV program, but their experiential learning, including the mentoring relationship certainly brings them closer to ways of deeper community engagement, and more capable of mobilizing positive community action.

Increased participant engagement will achieve greater organizational and individual development advantages and gains. In turn, greater fulfilment on both sides of the mentoring dyad will lead to increased altruism and volunteerism. Greater gains lead to greater satisfaction and more widespread fulfilment of program objectives.

While mentorship evolves into a more commonplace and accessible practice for professional and civil-society's development - regardless of whether it is paid for or free of charge, mandatory or discretionary - the need to create strategic approaches that share power and are tailored to individual needs becomes imperative as expectations of performance and network enhancements of mentees grow.

These particular shifts in the character of mentoring relationships and its extensive availability in community, academic and employment environments indicate that increasing variance, rather than consistency will be the way of a mentoring future.

7. RECOMMENDATIONS

Based on the research and analysis undertaken in the development of this report, sixteen recommendations for action have been identified and are divided into five tactical areas where improvements have been indicated. These areas consist of: training practices; pairing practices; stakeholder engagement; tools for success and program analysis. These treatments reflect the tactical importance of approaching improvements to LV's mentoring program from the varied perspectives of all stakeholders involved: Mentees, Mentors and Leadership Victoria. Although designed for immediate implementation, each of the recommendations may be divided within areas for implementation over the short or long term, as LV staff and board capacity permits, with the exception of the final recommendation 5D – the biennial review of best practices.

1. *Training Practices*

- A) Establish a baseline understanding of mentoring modes by adding a training component for both mentors and mentees - either at or immediately after the welcome retreat- to ensure that an early and consistent understanding of mentorship is applied – allowing pairs to personalize their mentoring relationship over time.
- B) Create a mentorship handbook that captures the training presentation components and outlines expectations with templates for implementation to ensure a consistent message is being delivered – for both mentees and mentors, especially those that do not attend the retreat, or whom are recruited later in the process.
- C) Arrange for mentors to meet at the retreat separately from the Cohort to begin establishing peer connections and co-learning opportunities.

2. *Pairing Practices*

- A) Biographies are a key piece of information used in the pairing process. Elicit mentor biographies using a template of specific questions to ensure consistency of information for distribution to the Cohort (mentees).
- B) Collect 'wish lists' for mentorship outcomes from mentees using questions similar to those asked of mentors above. This allows for synergies to be identified, making pairing easier for program managers.
- C) Allow mentors an opportunity to choose a mentee based on the 'wish list' above and the mentee biography following a similar template used with

mentors above. This may allow for a deeper engagement increasing possibilities of multi-directional mentorship benefits.

3. Stakeholder Engagement

- A) Share the Cohort's learning schedule (including dates) with mentors to allow them to anticipate and discuss LV program-related content and expectations with their mentees. Further, this information allows the pair to better plan their schedules in advance to ensure availability.
- B) Facilitate the development of a mentoring community of practice to build a pool of trained mentors in the community. Alternatively, extend direct invitations to mentors to participate and socialize with mentees at the Learning Day sessions allowing them to better familiarize with the demands of the Cohort.
- C) Consider making space at Learning Days exclusively for mentors to meet separately to discuss their experiences and trouble-shoot any concerns confidentially among peers (peer support for the mentors).

4. Tools for Success / Guide

- A) Provide a template to the mentoring pair for articulating desired outcomes and agreed upon commitments (Memorandum of Understanding). This MOU should also contain an exit strategy or plan which indicates when and how the relationship will formally end.
- B) Provide a schedule with dates that suggests expectation for frequency of meetings. Mentoring pairs then have a framework of time expectations, although they may chose together to depart from the schedule entirely.
- C) Supply a list of suggested topics of discussion to both mentors and mentees. Mentoring pairs then have a framework to begin discussions, although they may choose together to depart from the discussion topics entirely.

5. Program Analysis

- A) Conduct annual exit interviews / surveys with mentors and mentees at completion of LV program to gather valuable mentoring program feedback and to ensure proper closure has occurred.
- B) At same time as above, assess mentors' interest in continuing to volunteer.

- C) At same time as above, assess mentees' interest in volunteering on a Committee, and to establish whether further contact by LV is desired.
- D) Periodic (biennial) review of non-profit community mentoring practices by Mentorship Committee with a view to keeping the program current and meaningful.

Summary

Over time, and using this research as a baseline, continual diligence will be needed to determine if desired outcomes are realized or greatly improved after recommendations within this report are implemented. It is expected that surveys of both mentors and mentees will reveal a higher level of experiential satisfaction with the mentoring program and increased expression of leadership values being transferred. The organization may consider examining mentoring pairs or clusters as matched pairs or groups so as to better determine actual knowledge transfer and impact on decisions regarding career, education, family and / or volunteering in the subsequent years.

8. CONCLUSION

Mentorship provides opportunities to learn outside the classroom in a variety of desirable social settings. As examples, mentorship transfers explicit and tacit knowledge required to gain better understanding of a corporation's culture; learn how advancement occurs within governmental hierarchies; glean nuances required of human to human contact in healthcare; amass experience in teaching and curricula building; and develop leadership capabilities in communities.

The significance of this study is that it presents the client, Leadership Victoria, with both quantitative and qualitative data about its mentoring program collected from 38 mentee surveys and 10 mentor interviews, and situates that data in context of mentorship's evolving contemporary and historical practice as it is represented in academic and management literature. The stakeholder data was substantiated through data gathered by interviews with 3 local community-based mentoring program managers and examples of mentoring best-practices from the field. Important themes emerged and were discussed to provide some insight into the current state of the program and the implications the findings have for the organization.

The research in this report examined two areas: the effectiveness of Leadership Victoria's mentoring program in transferring knowledge and values to its mentees; and opportunities for enhancement of the program's existing outcomes such as deeper satisfaction and engagement by stakeholders.

The data revealed a moderate, but not exemplary level of satisfaction from both sides of the mentoring dyads which it has fostered over a decade, and draws attention to areas requiring sharper focus. Of significant note, this report's data indicated that several specific leadership values were transferring within dyads. This report prioritizes these values from the perspectives of the mentee, mentor and managers of other mentoring programs, revealing some significant alignment between the three groups. The literature examined did not explicitly disclose any significant insights into the transfer of specific values through mentorship, and yet the transfer of values was implicitly revealed in many articles reviewed.

A strategy to enact changes in the program arose from consideration of the findings and literature reviewed. Sixteen recommendations emerged which are broken down into five tactical areas: training practices; pairing practices; stakeholder engagement; tools for success and program analysis. Although this would appear to present considerable modification to the existing program, several of the recommendations may be considered long-term and are intended to keep the program relevant and connected to current practice, and may be implemented as capacity within the organization permits.

Research was not necessary to reveal the appreciation and worth of Leadership Victoria in the community. Its ongoing success in graduating an annual cohort of emerging and community-engaged leaders every year since its inception is a remarkable accomplishment in itself. This report demonstrates that if Leadership Victoria continues its commitment to transform its annual cohort into professional citizens through the added assistance of mentorship, it will pay dividends to both community and the individual.

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APPENDICES

APPENDIX A: Client's Letter of Introduction of Researcher (October 2012)

Dear Leadership Victoria Alumni,

Please allow me to introduce you to University of Victoria Graduate student Monique Lacerte-Roth (2010 Cohort Alumnus) who is completing her Master of Arts in Community Development through the University of Victoria's School of Public Administration. Her Master's Thesis Project is on the subject of knowledge transfer through mentorship. With the co-operation of Leadership Victoria, Monique will be analyzing Leadership Victoria's mentorship program by gathering the perspectives of past and recent program participants (mentees) as well as from the volunteer mentors themselves. Further comparative analysis of other non-profit mentorship programs is intended to provide valuable insight to aid the Board of Directors in implementing changes to the program that will bring about improved outcomes for all those involved.

We would ask that you take the time to reply to the attached URL linking to an electronic survey to provide her with valuable first hand insight into your own mentorship experience.

It is important to note that all responses will be completely confidential, and will at no time be associated to specific individuals. Reports to Leadership Victoria will only contain anonymized data. The survey questions have all passed a rigorous review by the University of Victoria's Ethics Review Committee.

Should you have questions about any of the above information, I invite you to contact either myself or Layla Cochrane at the following coordinates for clarification:

jackshore @shaw.ca.

layla@leadershipvictoria.ca

Most Sincerely,

Jack Shore, Executive Director

Leadership Victoria

APPENDIX B: Researcher Address

October 2012

Dear Fellow Leadership Victoria Alumnae,

As a 2010 participant in Leadership Victoria's *Leadership Development Program*, meeting and conversing with my assigned mentor was one of several memorable parts of an action-packed learning experience. I am interested in learning about your own mentorship experience and how it may have shaped your growth as a leader during the program or beyond that time. I invite you to take a few moments of your valuable time to complete the attached survey regarding your past or recent experience(s) with Leadership Victoria's mentorship program. Through the responses I will receive from the survey that follows, I hope to gain valuable insight into your personal mentorship experience and gather your valuable ideas about mentorship itself.

I will ask you to recall your personal mentorship experience and consider the values that you feel a mentor relationship SHOULD impart. What were your expectations before your mentorship began, and were they met? I am excited to learn this and other information from mentees and mentors alike so that I may make well-informed recommendations for improving outcomes of the program to my client, Leadership Victoria. For this reason, I ask that you are as forthright as possible, and when asked, please feel comfortable to make suggestions, or elaborate on your responses.

The program has been operating successfully for over a decade, but as with all things organizational, benefits can come from occasional analysis and review. Please help us make this as comprehensive a review as possible. Completing the survey should take no more than 20 minutes.

Should you have questions or wish to email me directly, please do so via email at mlacerte@uvic.ca.

Thank you for your assistance.

Sincerely,

Monique Lacerte-Roth, Graduate Student

Master of Arts in Community Development

School of Public Administration, University of Victoria

APPENDIX C: Informed Consent Form

**Master of Arts Community Development
School of Public Administration
University of Victoria**

*Participant Consent Form***Leadership Legacies: Knowledge Transfer through Mentorship**

You are invited to participate in a study entitled “Leadership Legacies: Knowledge Transfer through Mentorship”, that is being conducted by Monique Lacerte-Roth, on behalf of Leadership Victoria.

Monique Lacerte-Roth is a graduate student in the Master of Arts in Community Development program in the School of Public Administration at the University of Victoria and you may contact her by email if you have further questions at mlacerte@uvic.ca . Should you wish to speak with Leadership Victoria, you are encouraged to do so by contacting Layla Cochrane via email at layla@leadershipvictoria.ca .

As a GRADUATE student, Monique is required to conduct research as part of the requirements for a degree in Master of Arts in Community Development. It is being conducted under the supervision of Thea Vakil, PhD. You may contact her supervisor at: 250-721-6442 or by E-mail: tvakil@uvic.ca .

Purpose and Objectives

The purpose of this research project is to evaluate Leadership Victoria’s existing Mentorship program and recommend a strategy for improving perceived values and the practical application of knowledge for both mentors and mentees; expanding mentor recruitment strategies and increasing Leadership Victoria’s financial bottom line.

Importance of this Research

Research of this type is important because it will assist Leadership Victoria in making informed changes to its mentorship program to improve current outcomes for all participants. Furthermore, it will add to the discourse on mentorship in the non-profit sector.

Participants Selection

You are being asked to participate in this study because you are or were a volunteer mentor with Leadership Victoria’s *Leadership Development Program*.

What is involved?

If you consent to voluntarily participate in this research, your participation will comprise of agreeing to an in-person or telephone interview which should take no more than 20 minutes of your time.

Inconvenience

Participation in this study may cause some inconvenience to you, which may include taking up to 20 minutes of your time to complete an interview, and recollection of possibly embarrassing or uncomfortable situations which you may have experienced during your mentoring relationship.

Risks

There are no known or anticipated risks to you by participating in this research.

Benefits

The potential benefits of your participation in this research include: contributing to the revitalization of a program that you may volunteer for again in future; contributing your personal experience to a data set pertaining to mentorship; and expanding the mentorship community of practice.

Voluntary Participation

Your participation in this research must be completely voluntary. If you do decide to participate, you may withdraw at any time without any consequences or any explanation. If you do withdraw from the study your data will not be used.

Researcher's Relationship with Participants

The researcher may have a relationship to potential participants as she is an alumna of Leadership Victoria's 2010 Cohort. To help prevent this relationship from influencing your decision to participate, the following step to prevent coercion has been taken. Should you wish to contribute your opinions, but not agree to either an in-person or telephone interview, you have the option of completing a written questionnaire of the interview questions and submit them by email to mlacerte@uvic.ca, where the researcher will collect the responses for analysis.

Anonymity

In terms of protecting your anonymity, the researcher will not include any data that would allow Leadership Victoria to recognize individual respondents. All data will be presented in an aggregate format that cannot be attributed to individuals.

Confidentiality

Your confidentiality and the confidentiality of the data will be protected by anonymizing any identifiable responses through use of a coding system. Further, data will be stored on a security-encrypted USB memory key.

Dissemination of Results

It is anticipated that the results of this study will be shared with others in the following ways: Leadership Victoria will receive unattributed, aggregate data only as parts of the report received from the researcher. The raw data itself will remain with the researcher for a period of not more than two years. The research document (report) will be filed with the University of Victoria's School of Public Administration, and presented in a thesis-defense environment to a panel of peers and academics. The research then becomes part of University of Victoria's library of research for use by others.

Disposal of Data

Data from this study will be disposed of within two years of the research document's completion. Paper copies will be shredded, and any electronic data will be erased.

Contacts

Individuals that may be contacted regarding this study include the Researcher, her Supervisor or Leadership Victoria staff [Please see top of this document].

In addition, you may verify the ethical approval of this study, or raise any concerns you might have, by contacting the Human Research Ethics Office at the University of Victoria (250-472-4545 or ethics@uvic.ca).

Your signature below indicates that you understand the above conditions of participation in this study, that you have had the opportunity to have your questions answered by the researchers, and that you consent to participate in this research project.

Name of Participant

Signature

Date

A copy of this consent will be left with you, and a copy will be taken by the researcher.

APPENDIX D: Electronic Survey for Mentees**Leadership Victoria Mentorship Survey (2012/13)****What is your gender?**

- Male
- Female

Please identify your age range when you were a Leadership Victoria cohort participant?

- 20-30
- 31-40
- 41-50
- 51-60
- 60 +

How did you become a cohort participant in Leadership Victoria's Leadership (LV) Program? Please mark one response.

- I was recommended by a supervisor at work
- I approached LV to develop my leadership skills
- I wanted to connect/network with Victoria community
- I was recruited by a LV Staff/Board member
- A prior participant recommended the program
- Other, please specify...

Do/did you have prior experience in a mentoring relationship?

- Yes
- No

If yes, (above) in what type of environment? Select all that apply.

- Non-profit
- Corporate
- Private Practice
- Other, please specify...

**During your sessions, what values (if any) did your mentor convey as being important to leadership?
Please read the definitions carefully before answering the question. Select all that apply.**

- My mentor did not convey any values
- Honesty - truthful language and straightforwardness of conduct
- Responsibility- to be accountable for one’s actions
- Respect – high or special regard
- Fairness - marked by impartiality : free from self-interest, prejudice, or favouritism
- Integrity- total sincerity, and reliability
- Ethical decisions - principles of conduct conforming to accepted standards
- Loyalty - faithful to a cause, ideal, custom, institution, or product
- Empathy - understanding, being aware of and sensitive to the feelings and thoughts of others
- Self-control - restraint exercised over one's own impulses, emotions, or desires
- Other, please specify...

In your opinion, how important are the above values in developing leadership?

(Options for each value included: Very Important; Somewhat Important; Neither Important or Unimportant; Somewhat Unimportant; Very Unimportant.)

Honesty

Responsibility

Respect

Fairness

Integrity

Ethical Decisions

Empathy

Self-Control

Loyalty

Other (as Above)

Other (as Above)

Based on your Leadership Victoria mentorship experience, have you, or might you pursue another mentoring relationship?

Yes, as a mentor.

Yes, as a mentee.

No.

Please elaborate on your response...

Relating to your above response, if you responded yes, please indicate in what context. If No, Please skip to next question.

Non-profit

Corporate

Private Practice

Other, please specify...

What improvements, if any, would you suggest that Leadership Victoria make to its mentorship program?

Was the orientation to mentorship that you received from Leadership Victoria sufficient to help you realize its potential benefits?

- I did not receive mentorship orientation.
- Yes.
- No.
- Somewhat.
- Please elaborate on your response in the box below...

Were you given a selection of Leadership Victoria mentors to choose from?

- No, I was assigned my mentor.
- If Yes, how many choices did you have?

If No above, please move on to next question. If yes above, did you receive your choice of mentor?

- I received my 1st choice
- I received my 2nd choice
- I received my 3rd choice.
- Other.

How frequently did you meet with your mentor? If you like, feel free to add a comment.

- Once a week.
- Once a month.
- Other.

What would you have preferred?

- The time with my mentor was sufficient.
- More time would have been better.

- Less time would have been better.
- My mentor asked to see me more often.
- I asked to see my mentor more often.

How would you describe your time together?

- Beneficial to me
- Mutually Beneficial
- Of little use to me
- Awkward
- A Natural Fit
- Friendly
- Professional
- Other. Please elaborate...

Can you identify any possible barriers that may have impeded your mentoring relationship?

Please feel free to provide a few words on why you feel mentorship is or is not a beneficial component of Leadership Victoria's Leadership Development program.

THANK YOU FOR CONTRIBUTING TO RESEARCH THAT WILL ASSIST LEADERSHIP VICTORIA'S PROGRAM DEVELOPMENT.

Questionnaire Maker powered by [FluidSurveys](#)

APPENDIX E: Interview Questions for Mentors

Interview Questions for Leadership Victoria Mentors

Thank you for taking the time to respond to my questions about your participation as a mentor in Leadership Victoria's leadership development program. Please be assured that your responses are 100% confidential and will not be shared with Leadership Victoria at any time. Only your aggregate responses will appear in final report form.

Feel free to contact me either by phone or email so that I may conduct an interview with you at your convenience. This should take no more than 20 minutes. Should you not wish to be interviewed, you may choose to respond to the questions below and send them to me as an attachment in an email at: mlacerte@uvic.ca .

I can be reached by phone at: 250-818-7894.

Interview Questions:

1. How did you become a volunteer mentor with Leadership Victoria?
 - Were you recommended by a peer, were you recruited (if so, by whom) or did you come of your own volition? Can you tell me more about this?
2. Are you male or female?
3. What was your age range when you began to mentor for Leadership Victoria?
 - 30-40,
 - 41-50,
 - 51-60,
 - 61-70,
 - 70+
4. Was this a good age to work as a mentor? By this I mean, did it fit into your lifestyle at that time in your life? Why?
5. What was / is your primary motivation in being a mentor?
6. During your mentoring relationship(s), what values (if any) do you feel you imparted to your mentee(s) as being important to leadership?

Here are some examples of values to consider:

- I did not convey any values that I am aware of.
- Honesty - fairness and straightforwardness of conduct;
- Responsibility- to be accountable for one's actions;
- Respect – high or special regard;
- Fairness - marked by impartiality : free from self-interest, prejudice, or favouritism;
- Integrity- total honesty and sincerity;
- Ethical decisions - principles of conduct conforming to accepted standards;

- Loyalty - faithful to a cause, ideal, custom, institution, or product;
 - Empathy - the action of understanding, being aware of, being sensitive to, and experiencing the feelings and thoughts of others;
 - Self-control - restraint exercised over one's own impulses, emotions, or desires
 - Others: _____
7. Did you feel supported as a mentor by Leadership Victoria?
 8. Did you receive mentoring orientation? If so, was it sufficient? Please elaborate.
 9. What did you need to know as a mentor?
 10. Were you given a choice of mentees to work with or were you assigned one?
 11. What would you have preferred? (as per #9)
 12. Did you have introductory information about your mentee before you met?
 13. What changes or recommendations would you suggest Leadership Victoria make to its mentoring program?

Thank you very much for taking the time to consider my research questions. Please contact me by **December 5th** to send your responses or make an appointment for a brief interview.

Monique Lacerte-Roth, Graduate Student

MACD, University of Victoria

Leadership Victoria Cohort, 2010

mlacerte@uvic.ca or telephone 250-818-7894

APPENDIX F: Interview Questions for NGOs with Mentoring Programs

INTERVIEW QUESTIONS FOR OTHER NON-GOVERNMENT ORGANIZATIONS WITH MENTORSHIP PROGRAMS

INTERVIEW QUESTIONS
1. Name of Organization and Mandate
2. What is your organization’s rationale for having a mentorship program? Please elaborate:
3. How many mentorship relationships do you facilitate annually?
4. How successful is your mentorship program in achieving its goals? Can you explain why?
5. In your opinion, which values are important to leadership and mentorship in particular? (Read the following as examples) Honesty Respect Fairness Integrity Ethical Decisions Loyalty Empathy Self-control Other: _____
6. In your opinion, how important are the above values in developing leadership? Please elaborate:
7. Please tell me how your mentorship program may have changed since its inception?
8. Please tell me why changes were made to the program?
9. Have the above changes made a difference to the program’s Outcome?
10. How long are your clients (mentees) in a mentorship relationship? What is your program cycle?
11. Please explain your policy(ies) regarding your pool of mentors. Are there frequent changes, or limits to their service in place, or is it all ‘ad hoc’. Do you have more or fewer mentors than you require in a given cycle?
12. How do you train mentors to be in your program? Can you tell me about your

training process?
13. How do you prepare your clients for the mentorship experience? Is there an orientation process?

APPENDIX G: NGO mentorship documents to share

For more information on the program contact:



Human Resources Consultant
Tel (250) 472-5673

2012-2013 U Vic Mentoring Program Schedule of Events

DATE/TIME/LOCATION	ACTIVITY
November 9th, 2012 12:00 pm – 1:30pm BEC 402	Mentoring Application Deadline
January 24th, 2013 11:00 am – 1:00pm BEC 402	Mentoring Program – Kickoff event
February 28th, 2013 12:00 pm – 1:30pm BEC 402	Mentoring Luncheon
March 28th, 2013 12:00 pm – 1:30pm BEC 402	Mentoring Luncheon
April 25th, 2013 12:00 pm – 1:30pm BEC 402	Mentoring Luncheon
May 23rd, 2013 12:00 pm – 1:30pm BEC 402	Mentoring Luncheon
June 27th, 2013 12:00 pm – 1:30pm BEC 402	Mentoring Luncheon
July 25th, 2013 11:00 am – 1:00pm BEC 402	Mentoring Wrap-Up

NAME:	
POSITION:	
DEPARTMENT:	



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APPLICATION QUESTIONS:

1. In 2-3 sentences, please explain why you are interested in participating as a Mentee in the UVic Mentorship Program.
2. Please list 3 outcomes you wish to walk away with as a result of your participation in the program?
3. If you are chosen to participate in the Mentorship Program, how do you intend to use this experience to give back to the University community and/or help the University achieve its strategic goals?
4. Have you discussed your desire to participate in the UVic Mentoring Program with your supervisor/manager and do you have their support? **Please feel free to attach a short letter of support from this person (maximum one page).**
5. We have reserved at least one pairing for members of a designated group as defined by the University's Equity Policy (http://www.uvic.ca/shared/shared_usecdocs/policies/HR6100_1100_.pdf). Do you identify with any of these groups? *Please note that answering this question is completely voluntary.*



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MATCHING INFORMATION:

Do you have a specific person/position in mind for your Mentor? If yes, please provide details. If no, please proceed to the next question.
Which of the following statements apply:
<input type="checkbox"/> I want a Mentor in my current field of work <input type="checkbox"/> I want a Mentor in a different field of work (Please specify: _____) <input type="checkbox"/> It doesn't matter what field of work my Mentor is in as long as they meet some or all of the criteria specified below
What skills, qualities, and attributes are you looking for in a Mentor?
What 2-3 things do you want to learn from your Mentor?
Are you able to commit to participating in a Mentee Orientation Session, a Kick-Off Event, the Monthly Lunches, and a Wrap-Up Event as outlined in the 2012-2013 Mentorship Program schedule (see website) plus one-on-one sessions with your Mentor as agreed upon between the two of you?

SUBMISSION INSTRUCTIONS:

Please submit this completed application form and an optional letter of support from your supervisor/manager [redacted]

- By email: [redacted]
- By campus mail: Attention: [redacted] c/o Human Resources

Application Deadline: