Corporate Mentorship: An Article-Based Examination of Corporate and Cross-Cultural Implications for Organizations, Mentors and Mentees

by

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Abstract

Article 1: What is cross-cultural mentoring? An integrative literature review and discussion of the term cross-cultural mentoring

Addresses both the term *cross-cultural mentoring* and how it is used within the literature and the need for construct clarification. Examines existing descriptions of common cross-cultural mentoring processes across 123 sources. Four types of cross-cultural mentoring research are demarcated. A critique of the state of cross-cultural mentoring literature is provided. Suggestions are outlined to guide future empirical and theoretical work in a meaningful direction.

Article 2: What competencies are necessary in navigating cross-cultural mentoring relationships for immigrant entrepreneurs? Five things skilled mentors think, say, and do

This research provides an overview of cross-cultural[1] mentoring literature. Includes a description of a research study that makes two main contributions: (1) it describes the skills and/or competencies that have been reported as beneficial by immigrant mentees as they pertain to cross-cultural mentoring practice; (2) it

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[1] The term cross-cultural has been adopted as the colloquial term when referring to intercultural, and the two terms are at times used interchangeably. Cross-cultural is defined as the "comparison of cultural differences or situations in which such differences exist"(Stewart, E & Bennett, M., 1991, p. xii). In contrast, the term intercultural is used to describe the "actual interaction between people of different cultures" (p. xii). This paper employs the term cross-cultural mentoring in its colloquial form and portrays the interactive relationship when mentor and mentee come from different cultures.

highlights the importance of psychosocial and cross-cultural transition support in immigrant entrepreneur relocation success.

Article 3: Corporate mentorship programing: Promising program practices for "fast-tracking" high potential employees

Discusses a process evaluation used to monitor and document program implementation. Interprets program outcomes and informs future efforts in similar areas. Process evaluation components were comprised of qualitative data collection and document analysis. The evaluation of the programs was guided by two questions: What was the experience of mentors and mentees in the programs? and How effective was the mentoring program for mentors and mentees in relation to the process of implementation, and the achievement of program outcomes?

Key findings aid in understanding the relationship between specific program elements and program outcomes. Thirty-five summary findings are delineated and include: program outcomes, processes, relationships, and sustainability; training; inter-generational insights; knowledge dissemination; program replicability; match closure and structured exit processes; and various investments required to sustain such programs.

Key words: integrative literature review, mentoring, cross-cultural, intercultural, high potential employees, process evaluation, immigrant, entrepreneur, new destination communities, ethnic enclave

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Abbreviations

BIMP – Business Immigrant Mentorship Program
CMC – Computer Mediated Communication
EAL – English as an Additional Language
FtF – Face-to-Face
HRD – Human Resource Development
LMX – Leader-Member Exchange
MNA's – Multinational Corporations
SWOT – Strengths Weaknesses Opportunities Threats analysis
US – United States of America
Vs – Versu

Chapter I

Mentoring is a robust tool that offers a unique and holistic avenue to individuals who seek to learn new skills, gain new self-knowledge, build their performance and career capacities, and establish ongoing personal growth throughout their adult lives. It is the protégés'[2] and mentors' self-awareness, empathy, and social skills that will affect what actually transpires in their developmental relationships, each of which will have a direct impact on the quality of the relationship, the development of human resource capacity, and ultimately the success of the organization.

Mentoring, or some form thereof, is a phenomenon that has existed for longer than imagined. Many deem the creation of mentoring as deriving from Greek mythology, when Odysseus and Penelope entrusted guardianship of their son Telemachus to the care of a wise man named Mentor during the invasion of Troy. Mentor served as a model, counsellor, and teacher to Telemachus who was his apprentice, disciple, and student. Kram and Ragins (2007) note that Athena assumed residency in Mentor's body in order to teach, guide and protect Telemachus. Some scholars believe that mentoring originated when Ptahhotep, a sage in ancient Egypt, was selected around 25,000 BC to share his teachings and maxims with King Assa Dhed-Ka, Ra's son. Others submit that the modern use of the term 'mentoring' is more likely to have come from the work of

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[2] Protégé and mentee are synonymous and will be used interchangeable.

eighteenth-century writer Fenelon. Conversely, African scholars have noted that mentors were commonplace in Africa, long before the ancient Greek civilization (Knight Wilcox, 2002).

For the most part, such stories reflect a model that presupposes and captures commonly-used elements in the portrayal of a mentor as an older, more experienced and wiser individual who acts as an advisor, tutor, coach and protector of a younger, more inexperienced person (Finkelstein & Poteet, 2007). For the most part, these types of associations depict mentoring as informally evolving and account for much that has been learned about the role of mentors and about mentoring in its multiple dimensions. Each establishes a model that presupposes and captures commonly-used elements in the portrayal of a mentor as an older, more experienced and wiser individual who acts as an advisor, tutor, coach, and protector of a younger, more inexperienced person (Finkelstein & Poteet, 2007).

Until the 1970s, mentoring in the North American context was a practice that tended to occur spontaneously in the workplace and only for an elite group of managers who had been informally identified as individuals with high potential, who hoped to advance to senior management and who were most like those who already occupied similar positions. This form of mentoring affected a small segment of the workforce (Kram & Ragins, 2007).

During the latter part of the twentieth centrury, the growing interest in mentoring can, in part, be attributed to its potential and actual benefits becoming widely publicized within the popular press; replete with endorsements of well-

known business leaders and sports stars, each attributing his/her success to having a mentor. Corporate North America and organizations with individuals looking for a "leg up" increasingly recognized the possibility that one-on-one mentoring programs should be included in their constellation of training options in an effort to develop leaders, to retain or increase diversity, to facilitate the upward mobility of underrepresented groups, to aid succession planning, to respond to structural changes, and to enhance the direct learning of their employees. In this vein, formal mentoring programs (when well executed) offer organizations and their people a competitive edge. Due to the interest of these various constituents, during the latter part of the twentieth century, mentoring in its Western context became more strategic and organized. Among Fortune 1000 companies, for example, sixty-four percent use mentoring as an educational tool (Kahle-Piasecki, 2011); among Fortune 500 companies seventy-one percent have mentoring programs (Orsag Madigan, 2000).

Education, or rather, lifelong learning, is the "handmaiden" of industrialism. Correspondingly, this has great implications for institutions of higher learning (Jarvis, 2000). Of similar interest is the effect that it has had and will have on the education of adults within the world of work. Among the industrial and business world, there is a "war for talent," in that most organizations recognize that "the rate of learning in an organization has to be greater than the rate of change for the organization to survive" (Revens, as cited in Bard & Moore, 2000, p. 255). Correspondingly, companies are endeavouring to become learning organizations. In other words, an entity that attaches great

value to creating, acquiring, improving, interpreting, retaining and transferring tacit and explicit knowledge holdings to improve performance, facilitating individual and collective learning, and purposefully integrating and modifying behaviours and practices of the organization and its members as a result of the learning (Conlon, 2003).

For this reason, training has become more essential within the Western corporate context due to the shift from a manufacturing-based economy to one that has been increasingly replaced with knowledge-based industries; the workplace has changed and there is an expectation for continued professional development. Due to this shift, there has been significant change in the nature of education and learning. It is recognized that Fordist forms of work organization, based on F.W. Taylor's production process through the specialization of tasks, has waned. Rapid change in technology necessitates increased knowledge absorption and application, lest workers become alienated from the world that surrounds them. There are various post-Ford incarnations, including Picore and Sable's (1984) model of *flexible specialization*, and Kern and Schumann's (1984) *new production concepts* in Europe; human-resource management (HRM) and *knowledge management* (Evans & Fuller, 2006) in North America; and *learning organization* models based on Mary Parker Follett's work in Japan (Follett, Metcalf & Urwick, 1941).

Regardless of the model, individuals have increasingly become entrepreneurial managers of their knowledge, keeping abreast of the requisite

innovations to ensure their marketability and employability both inside and outside their organizations (Higgins & Kram, 2001).

Rationale/Gaps

Research studies on mentoring are largely limited to the last 29 years, beginning with Kram's (1985) published research on mentoring in the workplace (Allen, Eby, O'Brien, & Lentz, 2008; Noe, Greenberger, & Wang, 2002; Wanberg, Welsh, & Hezlett, 2003). Although a substantial body of research has accumulated regarding mentoring, *workplace mentoring*, according to Allen (2008), is a relatively new focus of study; entrepreneurial mentoring is newer still. Moreover, the extent to which mentors and protégés learn from each other has not been formally studied (Hezlett & Gibson, 2005). Bearman, Blake-Beard, Hunt, & Crosby (2007) contend that part of the problem arises because mentoring research is in its infancy; researchers had been preoccupied with demonstrating that mentoring *works*.

With researchers now satisfied that mentoring works, it is the exploration of *how* and *why* that has emerged as the focus of inquiry. Current research increasingly delves below the surface of mentoring. The philosophical and educational underpinnings for instance, have yet to be fully explored. According to Bearman et al. in *The Blackwell Handbook of Mentoring* (2007), the inner workings and the causal mechanisms of mentoring form the most pressing research agenda for scholars in the field. Research examining mentor dependability, for example, has found that mentor reliability alone can make the

difference between a mentoring relationship, providing either benefit or detriment to protégés (Allen, Eby & Lentz, 2006).

Increasing understanding of the psychosocial aspects of mentoring is immediately useful to administrators recruiting mentors, and to administrators developing training programs for mentors. According to D'Abate (2008), what program administrators require are the "keys" to unlock the success of mentoring programs and their inner workings to capture, understand, standardize and ultimately duplicate mission critical behaviours (Bearman, et al, 2007; Hezlett, 2005; Kram & Ragins, 2007; Noe, et al, 2002). Calls for research on the proposed topic of workplace mentoring within formal hierarchical dyadic relationships can be attributed, in varying degrees, to the fact that:

- Formal workplace mentoring is a relatively new focus of study (Allen, et al, 2008);
- Why and how mentoring works is a recent question within the field
- As indicated by the credentials of contributors listed in the *Handbook of Mentoring at Work: Theory, Research, and Practice* (Kram & Ragins, 2007), those currently researching the area of mentoring are **not** from the field of education.

Format for Thesis

This study is presented in articles-format, which is acceptable under the regulations of the School of Graduate Studies at the University of New Brunswick. In contrast to a traditional style thesis, with unique chapters focusing on the introduction, methods, results, analysis, and discussion/conclusion, an

articles-format thesis generally includes an introductory chapter, two or more publishable/commissioned manuscripts and a concluding chapter (Moris & Tipples, 1998). The structure of this dissertation includes six chapters the current introductory chapter, a literature summary and methodology chapter, one journal article (submitted), one book chapter (in print), one commissioned corporate document (submitted), and a concluding chapter. In the introductory chapter, the background and objectives of this research will be discussed. The literature review chapter places the research in the larger context of the current body of literature pertaining to adult mentoring in the work place and cross-cultural mentoring as it relates to immigrant entrepreneurs.

To the author's benefit, this approach is conducted in "publishable format" and does not involve the conversion process of a traditional style thesis; accordingly authors are able to move to the journal submission phase, or to the delivery of contracted documentation immediately upon completion (as per the MITACS fellowship agreement). Correspondingly, manuscript styles vary to meet the requirements of targeted journals, the book editors, and the corporate client. The paper format thesis may also benefit the reader as it is both comprehensive and succinct. The concluding chapter provides a general discussion that includes recommendations for future investigators, implications of study findings for practice, and a conclusion. To date, the research from chapter 3, "What competencies are necessary in navigating cross-cultural mentoring relationships for immigrant entrepreneurs? Five things skilled mentors think, say, and do"

chapter has been accepted as a book chapter in *Uncovering the Hidden Cultural Dynamics in Mentoring Programs and Relationships: Enhancing Practice and Research* (Kochan & Green, 2014). Due to word restrictions it has been shortened and renamed "*Factors that foster successful cross-cultural mentoring relationships for immigrant entrepreneurs: An in-depth analysis.*" The chapter entitled, "What is cross-cultural mentoring? An integrative literature review and discussion of the term cross-cultural mentoring" is currently being prepared for publication in the *International Journal of Mentoring and Coaching*, and the corporate document has been released to the commissioning organization.

Description of Articles

The proposed articles and research formats for this dissertation are as follows:

Paper 1. What is cross-cultural mentoring? An integrative literature review and discussion of the term cross-cultural mentoring, submitted to the *International Journal of Mentoring and Coaching*.

Gap. Identifying the number of individuals who have participated in cross-cultural mentoring depends on how the term is defined. Is it cross-cultural or inter-cultural? Is cross-cultural mentoring the same for third generation black Americans as it is for recent immigrants? It is difficult to specify precise incidence and prevalence when terms describing cross-cultural mentoring are used inconsistently. Currently, the broad literature on cross-cultural mentoring lacks agreement on what this construct represents; the lack of consistent

terminology is counterproductive in terms of understanding the relevant processes and approaches.

This research examines existing descriptions of common cross-cultural mentoring process across 123 sources and addresses the need for construct clarification. Four types of cross-cultural mentoring research are demarcated. Emerging research regarding cross-cultural mentoring is synthesized to identify variables and to discern the most pressing gaps. A critique of the state of cross-cultural mentoring is provided. Suggestions are outlined to guide future empirical and theoretical work in meaningful directions.

Methodology. An integrative review, the broadest type of literature review methodology, was used, allowing for the inclusion not only of diverse methodologies but also the contribution of varied perspectives on the phenomenon of concern (Torraco, 2005; Whittemore & Knafl, 2005). According to Whittemore and Knafl (2005), the varied "sampling frame of integrative reviews in conjunction with the multiplicity of purposes has the potential to result in a comprehensive portrayal of complex concepts, theories, or [problems]".

Significance. In light of the ongoing move toward economic globalization, immigration trends and workforce diversity, this research has the potential to provide valuable information to not only "traditional" same race/culture mentoring relationships, but also to cross-cultural youth and faculty-student mentoring programs, and to impact immigrant and expatriate mentoring efforts.

Paper 2. Factors that foster successful cross-cultural mentoring relationships for immigrant entrepreneurs: An in-depth analysis, in *Uncovering the Hidden*

Cultural Dynamics in Mentoring Programs and Relationships: Enhancing Practice and Research (Kochan & Green, 2014).

This article reports on promising practices in cross-cultural mentoring and examines the Business Immigrant Mentorship Programs (BIMPs) in cities with developing immigrant populations, or *new gateway communities.* The research examined how immigrant mentees perceive the diverse meanings of cross-cultural mentoring and the skills and/or competencies that are required of the mentor or mentee as they pertain to knowledge transfer and personal learning within the dyad, acculturation, and perceived business and network gains on the part of the mentee.

Gap. The growing literature on western domestic cross-racial mentoring is characterized by examinations of metropolitan populations that are predominantly part of African American, Hispanic, Asian or visible minority populations in the United States, and therefore, provide at best only limited knowledge of the intersection at which, for example, immigrants, expatriate workers, exchange students and cross-cultural mentoring meet.

Methodology. Better practice research is a method of investigation emerging from the need for applied research that attempts to identify high impact, low cost interventions for real-world problems. This methodology recognizes evidence-based practices, and takes into account the perspectives and experiences of service providers and other "on the ground" practitioners. Value is placed on client (or user) feedback and reflection, and on the

development of effective means of knowledge translation and transfer. Steps in conducting better practice research include:

Step 1: Define the scope, problem, and process for review

Step 2: Identify the sources of evidence, including:

- Review of key literature in order to identify the research gap and to highlight how past research bears on the research problem
- Interviews with key informants representing the target population; practitioners experienced in addressing the areas of inquiry; decision-makers at organizational, community, provincial, national levels; and investigators experienced in researching the issue or working with the population of interest

Step 3: Analyze and synthesize the evidence, converging findings into concise, supported and categorized better practice statements

Step 4: Present results

Quantitative data were collected via electronic surveys using Likert scales, as well as both closed and free text questions. Qualitative data were collected through semi-structured interviews with some open-ended questions.

Significance of Paper. This research highlights the skills and/or competencies that are required of the mentor and/or mentee as they pertain to cross-cultural mentoring practice, emphasizes the importance of psychosocial

and cross-cultural transition support in immigrant entrepreneur relocation success and it speaks to the economic benefit.

Paper 3. Corporate mentorship programing: Promising program practices for "fast-tracking" future leaders, is a commissioned corporate report.

This document provides a summary of findings related to a process evaluation undertaken as part of a MITACS doctoral fellowship. Ethics approval was granted by the University of New Brunswick's Research Ethics Board, and data were gathered over a one year period.

Gap. XYZ Corporation (XYZ) required data regarding existing mentorship programing, including an evaluation of relevance, benefits and outcomes, functioning, and operationalization. XYZ requested analysis of data regarding individual perspectives pertaining to the execution of mentoring efforts and analyses of the existing program(s) that could inform the design of future XYZ mentoring programs.

Methodology. The process evaluation components were comprised of qualitative data collection and document analysis. Quantitative data were collected via electronic surveys using Likert scales, as well as both closed and free text questions. Qualitative data were collected through semi-structured interviews with some open-ended opportunities. Member checking and peer review were used to validate the study. Data were gathered from mentor/mentee participants and members of the Human Resource Division, and a review of program documents and materials was undertaken.

The document review[3] examined the company's key operational and relationship processes as outlined in existing XYZ documents. The review was conducted using a page-by-page staged review process to identified gaps in the print material. This approach examined the documents in light of current research and identified promising practices in the field of mentoring. Suggestions for strengthening the documents were submitted to the corporate client. The quality and value of process documents were also evaluated.

Significance. The process review provides in-depth recommendations that would assist XYZ in blending various mentoring efforts into a cohesive program, providing a foundational roadmap for XYZ moving forward in subsequent mentoring initiatives.

Conclusion

For both cohorts - immigrant entrepreneurs and employers - an effective "just-in-time" education strategy is required. To this end, findings from this research may be used to assist in maintaining high organizational quality in a time of human resource transformation, flux and globalization by providing necessary information to improve mentoring programs, management development, and organizational change initiatives. Three key areas of strength were specifically highlighted in this review: positive and dedicated participants; participants dedicated to creating a mentoring culture; and stories of program

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[3] To respect confidentiality the document review in not included in the dissertation.

impact and success. Many participants spoke of powerful developmental relationships and expanding networks that served their unique career needs and goals. Mentorship is a process where the benefits are transmitted though personal experiences rather than learnt in a conventional manner. Mentoring was recognized as a robust tool that offers a holistic approach to learning new skills, gaining new self-knowledge, building performance and career capacities, and establishing avenues for ongoing personal growth. It is hoped that mentor and mentee input captured within this evaluation can be used to guide the prioritized implementation of specific mentoring interventions.

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Chapter II: Literature Summary and Methodology

Foundational to this research effort was the literature review. Various databases were searched for articles. The search of online databases in the social sciences included CINAHL, Eric, Business Source Premier, Google Scholar, and PsycINFO, Academic Search Premier, Scopus, Digital Dissertations and the WEB of Science. Manual searches of journals that commonly publish articles on mentoring (e.g., *International Journal of Mentoring and Coaching*, and *Mentoring & Tutoring: Partnership in Learning*) were also conducted. Applicable industry organizations including Metropolis (a national research knowledge creation and transfer network), the International Mentoring Association and Canadian Evaluation Association were also consulted; books, articles, journals and government documents were manually reviewed; and informal conversations' with practitioners and researchers present at the International Mentoring Conferences and the Canadian National Metropolis Conference, for example, informed the approach for analyzing programs and conducting literature reviews.

Search terms used to identify potential sources within the Western English language context included, but were not limited to:

- Human resource development
- Adult education and support via mentoring
- Entrepreneurial mentoring
- Corporate mentoring

- Process evaluation
- Entrepreneurial learning
- Process evaluation methodology
- Mentoring and diversity
- Cross-cultural mentoring
- Acculturation, *new destination communities* or communities with emerging immigrant populations(Atlantic Canadian Context)
- Immigration

Formal Workplace Mentoring Programs

Due in great part to the broad benefits that slowly became associated with mentoring and mentoring relationships, the body of mentoring research expanded. Popular books and articles on mentoring began appearing in a concerted manner in the late 1970s and early 1980s. Kram's (1985) seminal qualitative study *Mentoring at work* proved to be a pivotal point for mentoring research within academia. *Mentoring at work* examined relationships at work that support the career development and psychosocial growth of young and junior managerial employees. This work defined mentoring roles and stages in the mentoring process, stimulated the theoretical and empirical investigation of mentoring in organizations, and focused on the didactic relationship between the mentor and mentee, postulating that this relationship comes into being and is maintainable only when the developmental needs of both parties are complementary. Due to the work of these and other authors, economic factors

and popular media interest, mentoring has steadily increased in many fields including education, management, psychology and health care.

Coaching versus Mentoring in the Workplace

In part, due to and also in spite of mentoring's increased popularity, there is often understandable confusion between *coaching* and *mentoring*. Despite sharing many similarities and a common focus on growth and advancement, there are differences. Coaching, for example, is primarily concerned with skill development and the development of self-knowledge. Coaches are generally not subject matter experts, but rather experts on how people change. Within the business world, coaches have formal training in coaching and are paid for their services (D'Abate, Eddy & Tannenbaum, 2003).

In contrast, mentors have experience to share with the mentee in the career, field, profession or job they share; it is the mentor's professional and/or workplace knowledge, expertise and network that give mentoring its distinctive character. Mentors are usually unpaid and personify the passion for their expertise and knowledge. Mentoring is a didactic relationship between two people: the so-called *mentor* and *mentee* (protégé). Unlike a teacher or coach who is focused on a particular set of skills, a mentor is a guide. This definition allows for the possibility that a mentor may be younger than a mentee (D'Abate, et al., 2003).

The 21st century model has moved beyond the limitations of the traditional mentoring structure – one hierarchical in nature – to one that is more egalitarian, and based on equity rather than equality. In other words, both

parties are stakeholders and accordingly, both parties have equity in the relationship (Jones & Brown, 2011). Mentoring is a transactional relationship grounded in learning; in this case, adult learning. The mentor is a facilitator of knowledge who assists in bringing clarity regarding the mentee's own aspirations for improvement, helping each mentee diagnose the gap between aspiration and present level of performance. Given the broad scope of mentoring, both in regard to characteristics and professions that use mentoring, it is not surprising that a 2011 review of literature between 1980 and 2009 found over 40 different definitions for mentoring (Haggard, Dougherty, Turban & Wilbanks, 2011).

Moreover, efforts to conceptualize the phenomenon have led to some confusion, as different disciplines – academia, business, and government – have different definitions of the term (Jacobi, 1991). The essential concept that can be drawn from the definitions is that mentoring is a multi-dimensional and multi-functional developmental relationship that evolves over time. These elements distinguish mentoring from its individual components, establishing mentoring relationships as an example of the sum being greater than the parts (Jacobi, 1991). Kram (1985) holds that mentoring is a special type of developmental relationship that is mutually beneficial for both parties as it evolves, and includes a range of career and psychosocial functions. As many researchers have observed, there are probably as many different definitions of mentoring as there are individuals using the term.

There is, however, more to mentoring than its definition. What distinguishes this dyadic relationship from others is that in mentoring, the primary motive is the transfer of knowledge, skills, values and psychosocial support. In sum, workplace mentoring is a special type of developmental relationship that is mutually beneficial for both parties as it evolves, and includes a range of career and psychosocial functions. Career functions refer to sponsorship, exposure and visibility, protection, and challenging assignments; psychosocial functions include role modeling, acceptance and confirmation, counseling and friendship (Kram, 1985). Though not mentioned in the research, in such terms, economic guidance is not infrequently an outcome of the relationship. Throughout the duration of the relationship, the career functions and the psychosocial functions often occur concurrently. Though not mutually exclusive, many of the career functions of mentoring depend upon the organizational roles of both members of the dyad. The psychosocial functions of mentoring, however, require a personal commitment on the part of both the mentor and the mentee.

Research Context

In the last thirty years the "mentoring advantage" has become increasingly utilized and accordingly, researched within academic literature. Such research has included effective mentoring practices; mentor and protégé outcomes or the lack thereof; relationship effectiveness (Allen & Eby, 2003); data from companies that have implemented formal programs (Bisk, 2002); case studies of both mentoring programs and the dyad relationship (Cureton, Green &

Meakin, 2010); participant training (Garvey & Alred, 2000); gender and race (Dreher & Cox, 1996); and e-mentoring (Kram & Ragins, 2007); to highlight just a few. Peer-reviewed journals created specifically as forums for academic, empirical research include *The International Journal of Evidence Based Coaching and Mentoring* and *The International Journal of Mentoring and Coaching*.

In sum, research regarding mentoring has boomed, and recent publications on mentoring highlight that knowledge of mentoring is maturing (Allen, Eby, Poteet, Lentz & Lima, 2004; Noe, Greenberger, & Wang, 2002; Underhill, 2006; Wanberg, Welsh, & Hezlett, 2003). In spite of the interest, after reviewing the methodology and content of over 200 published mentoring articles, Allen Eby, O'Brien, & Lentz, (2008) and Hezlett (2005) were critical of the lack of progress in the theories pertaining to mentoring, and strongly suggest that the construct has been held back by the lack of critical evaluation and assessment of existing research.

Although a substantial body of research has accumulated, there are gaps in the development of mentorship as an area of scientific inquiry - within the literature on mentoring, research on learning and mentoring is in, for example, its infancy. According to Hezlett and Gibson (2005), the extent to which mentors and protégés learn from each other has not been formally studied. The deficit of systematic research on the dynamics of learning in the mentoring relationship is further echoed by Hale (2000) and McCauley (2005). The *just-in-time* learning formula that mentoring provides offers more than immediate training: it is also a

developmental relationship. It is more than a training exercise with a list of preconceived teachables (Allen & Eby, 2003; Bard & Moore, 2000; D'Abate & Eddy, 2008; Henriques & Curado, 2009; Hezlett, 2005; Hung, 2003; Lankau & Scandura, 2002; Lankau & Scandura, 2007).

The Functions of Mentoring

Not only the variation in operational definitions plagues the term *mentor* and mentoring research, but also the ways that researchers have defined the functions that a mentor provides to the protégé. Jacobi (1991) provides an overview of fifteen functions or roles that have been ascribed to mentors, including:

- Acceptance/support/encouragement
- Advice/guidance
- Bypass bureaucracy/access to resources
- Challenge/opportunity/"plum assignments"
- Clarify values/clarify goals
- Coaching
- Information
- Protection
- Role model,
- Social status/reflected credit
- Socialization/ "host and guide"
- Sponsorship/advocacy
- Stimulate acquisition of knowledge

- Training/instruction
- Visibility/exposure (p. 509)

Again, there is no consensus; Jacobi (1991) extrapolated these functions with the hope that they would stimulate discussion about the range of behaviours that have been touted to characterize mentor-protégé relations, and in an effort to underline the need for uniformity and clarity. For every function or role, Jacobi insists that three criteria must be satisfied: each would have to provide a generic description of mentoring and could not be dictated by a particular population or setting; their function or role must be original; and their descriptions relatively detailed.

Not surprisingly, a review of literature on adult business mentoring reveals considerable disagreement on the role model function and classification of mentors. The most common nomenclature under which each of the formerly mentioned fifteen functions or roles can be classified includes: psychosocial, career and professional development, and role modeling. In summary, there is general lack of agreement; yet, each describes mentoring at the highest end of a continuum of helping relationships. Some research promotes the notion that economic and professional success results from mentoring (Roche, 1979).

Existing literature suggests that mentoring can provide benefits that may offer a buffer against the challenges experienced by employees facing organizational change (Viator, 2001). Mentoring is thought to encourage employees to feel appreciated by the organisation, as mentors feel their knowledge and experience is valued by their peers and subordinates; and

mentees feel that the organisation is prepared to invest in their future (Clutterbuck, 2008). Mentoring also helps to rekindle the enthusiasm of disillusioned employees (Clutterbuck, 2008), and revitalise plateaued staff and senior staff members (Kram, 1985). Mentoring relationships also help to increase the self-esteem and self confidence of staff (Ramaswami & Dreher, 2007). Mentoring provides a safety valve for career-related frustrations, allowing mentees to discuss incidents that impact their professional lives (Sosik & Godshalk, 2000).

Moreover, mentorship provides psychosocial assistance in the workplace (Kram, 1985), which assists mentees to deal effectively with role ambiguity, role conflict and perceived environmental uncertainty (Viator, 2001). It can encourage employees to manage changing environments and issues related to organisational culture and politics, which can impact negatively on self esteem and performance. Mentoring can, therefore, be seen as a developmental tool that provides a number of organisational benefits above and beyond the benefits to individuals of professional development and career progression (Clutterbuck, 2008; Sosik & Godshalk, 2000; Viator, 2001).

Mentoring is a unique personal relationship, characterized by trust and the sharing of expertise and moral support. The resulting interpersonal relationship that successful mentoring relationships offer is a powerful force with the capability of facilitating not just learning and moral support, but also, if not more importantly, networking. After all, *it's not what you know but who you know*! Mentoring relationships can enhance a person's social capital and their

opportunities to network with people who may be able to help them meet their goals (Hamilton, Hamilton, Hirsch, Hughes & Maton, 2006). Many protégés achieve success while involved in a mentoring relationship simply through the connections and networks their mentor may build through pursuing his or her own career objectives (Bozeman & Feeney, 2008).

Formal Mentoring in the World of Work

Organizational Benefits. Due to its possible application as a developmental tool that provides a number of organizational benefits above and beyond the benefits to an individuals' professional development and career progression, mentoring can also be framed within the context of organizational functionality (Clutterbuck, 2008; Viator, 2001; Sosik & Godshalk, 2000). Stable human relationships form the core of any successful organization; and while identified some years ago, Rubow's and Jansen's (1990) perspectives are of current importance and advise that the power of the dyad relationship lies in the strength of the pair rather than in the transfer of technical information, which is secondary. Moreover, emerging literature suggests that mentoring programs have the potential to provide a plethora of benefits for organizations.

Organizationally Administered Mentoring Programs. As with any organizational intervention, the effectiveness of mentoring is dependent on adequate planning and infrastructure. The initial steps include the completion of a needs assessment to determine whether a formal mentoring program is required, and which needs the mentoring will address. The analysis should be conducted at both the organizational level and at the personal level (Kram,

1985). Organizational support, specifically top management buy-in, is critical to the program's success. Research indicates top management support has been related positively to training adoption, employees' confidence and commitment to the program, and the promotion of a learning culture that values and models setting program objectives. Specific benefits occure when mentoring programs are integrated with other Human Resources development strategies, and are embedded within the organizational culture (Allen, et al., 2004; Allen & O'Brien, 2006; Eby & Allen, 2008; Egan & Song, 2008; Hung, 2003; Underhill, 2006).

Cross-Cultural Mentoring for Newcomer Entrepreneurs

Beyond traditional corporate culture, mentoring has rapidly gained popularity as a customized way to assist and support entrepreneurs with personal learning goals, psychosocial support and economic guidance. Entrepreneurs often have to deal with significant barriers in getting started and maintaining their businesses (St-Jean, 2009). Aside from the well-researched financial challenges faced by all entrepreneurs – including lack of financial capital – immigrant entrepreneurs face additional problems when starting a business. Among immigrant entrepreneurs, these problems are further compounded by a lack of social integration or existing networks, leading to insufficient knowledge of their new business milieu; the economic and social environments; legislation and regulations; and the labour market (Brenner, Menzies, Dionne & Filion, 2010; Ley, 2003; Light, 1984; Rath & Kloosterman, 2000). Correspondingly, immigrant entrepreneurs living in nonmetropolitan immigrant gateways or non-traditional immigrant-receiving communities where

the institutional and cultural resources to deal with immigrant diversity are limited, face other obstacles that restrict their chances of fully participating in the economy (Price & Chacko, 2009). It is not surprising then, that the limited ability of all entrepreneurs to face the challenges inherent in launching a business has been identified as the main factor in the high failure rate of new businesses (Brenner, et al., 2010).

Few studies have focused on how issues facing entrepreneurs are navigated in mentoring relationships (Ensher, Murphy, & Vance, 2000; St-Jean, 2009), and fewer still when immigrant entrepreneurs are included in the literature scan (Chan, 2008). Although mentoring research has examined a number of important contextual variables such as race and gender (Kram, 1985; Noe et al., 2002; Ragins & Scandura, 1999), several studies on cross-cultural mentoring in the workplace have reached the troubling conclusion that protégés in cross-cultural mentoring dyads receive less career and/or psychosocial support than protégés who have mentors who are culturally similar to them (Dreher & Cox, 1996; Feldman, Folks & Turnley, 1999; Thomas, 2007; Thomas, 1990). These results point to the saliency of race and culture in mentoring relationships and the need for participant competency in navigating cultural differences. However, this area of inquiry is in need of targeted examination (Brenner et al., 2010), particularly in terms of how cross-cultural differences can be negotiated and what skills and/or competencies are required of the mentor and mentee to influence cross-cultural mentoring relationships (Chi-Ying, Bemark, & Talleyrand, 2007).

Calls for research on the proposed topic of cross-cultural mentoring within formal hierarchal dyadic mentoring relationships can be attributed in varying degrees to the fact that:

- Research focuses on one or two ethnic groups in particular, and therefore provides only partial knowledge of immigrant entrepreneurship (Sharif, 2009).
- Even where the study sample includes several ethnic groups, these studies are based in urban centres with ethnic enclaves (Blake-Beard, 2009; D. A. Thomas, 2001).
- Research often concentrates on new destination immigrants as workers, resulting in a dominant view of immigrants as primarily a labour supply rather than as entrepreneurs (Zarrugh, 2007).
- Researchers have tended to focus on the characteristics of the entrepreneurs themselves, leaving aside detailed assessment and evaluation of programs.
- Researchers have yet to examine if trust vis-a-vis mentoring can be found to be related to increased perceptions of business benefits, increased resource exchanges, and network sustainability.
- White males occupy the "predominant mentoring class"; in other words, business owners.
- Entrepreneurial mentoring tends to lag behind organization research (Bisk, 2002).

In sum, a key challenge for research on mentoring is to move beyond the faulty assumption that the experience of race or culture does not shape, alter or drive the mentoring relationship. Thomas (2001) encourages scholars to acknowledge that within their own mentoring research, it is inappropriate to assume that the experiences of one group adequately and accurately capture the experiences of other groups. With a few exceptions, mentoring models have been defined based on the experience of one dominant racial or ethnic group and not multi-group membership. Thomas (2001) and others (Blake-Beard, 2009; Blake-Beard, Murrell, & Thomas, 2006) call for research that can articulate the authentic dynamics of mentoring in diverse relationships.

Methodology Conceptual/Framework

This article-based dissertation employs three primary methodologies and approaches. Two of the articles: What is cross-cultural mentoring? An integrative literature review and discussion of the term cross-cultural mentoring and What do newcomers value in cross-cultural mentoring relationships? are both explorations grounded and framed within an overall theoretical perspective.

Specifically, Kim's (2001, 2005, 2008) work in the field of Cross-Cultural Adaptation Theory provides a foundation for examining the lived experiences of immigrant entrepreneurs, and more broadly, lends insights to "the natural human tendency to struggle for an internal equilibrium in the face of often adversarial environmental conditions" (Kim, n.d.). According to Kim (n.d.), effective inter-cultural mentorship leads to "a perceptual and emotional maturity and a

deepened understanding of human conditions". It is within this construct and theoretical perspective that findings and program efficacy was examined.

Findings from the articles: What do newcomers value in cross-cultural mentoring relationships? and the paper "Corporate mentorship programing: Promising practices for "fast-tracking" future leaders was considered in light of Leader-Member Exchange (LMX) theory (Dansereau, Graen & Haga, 1975; Graen, Liden & Hoel, 1982), which posits that approaches taken by leaders are differentiated according to specific relationship qualities that exist among individual dyads. As such, some mentees will enjoy "high-quality exchanges with their <mentor>, characterized by a high degree of mutual trust, respect and obligation....whereas others experience low-quality exchanges" (Scandura & Pellegrini, 2007, p. 3). LMX theory lent a perspective to these studies in its consideration of the quality of interactions within dyads, an understanding that has been associated with positive mentorship outcomes such as work satisfaction, promotion and commitment to the organization (Gerstner & Day, 1997; Keller & Dansereau, 1995; Liden, Sparrowe & Wayne, 1997; Scandura & Schriesheim, 1994; Wakabayashi, Graen & Uhl-Bien, 1990).

Overview Paper 1: What is cross-cultural mentoring? An integrative literature review and discussion of the term cross-cultural mentoring

In an effort to clarify how cross-cultural mentoring is reported, a between-study (Onwuegbuzie, 2012) an integrative literature review method (Torraco, 2005) was employed in order to (a) examine the multiple meanings accorded to

the use of cross-cultural mentoring; (b) explore the range of phenomena to which it refers; and (c) discuss the implications for professional practice.

The integrative literature review is a form of research that reviews, critiques and synthesizes representative literature on a topic in such a way that new frameworks and perspective on the topic are generated (Torraco, 2005), and a between-study literature analysis involves comparing and contrasting information from two or more sources. A within-study literature analysis involves analyzing the contents of a specific work.

Torraco (2005) proposes that literature reviews are appropriate when contradictory evidence appears; when there is change in a trend or direction of a phenomenon and how it is reported; and when research emerges in different fields, such as seems to be the case here. Accordingly,"[p]revious work [in any field] is always vulnerable. Criticizing is easy, and of little value" (Torraco, 2005). Given that, Daft, as cited by Webber and Watson (2002), believes that there is more value in explaining "how research builds upon previous findings rather than to claim previous research is inadequate and incompetent (p. xiii)."

Method and Analysis of Data

This between-study integrative review utilized a meta-synthesis non-statistical method—which is a summary and critical analysis of existing research related to the field of cross-cultural mentoring in an effort to integrate, evaluate and interpret the findings of multiple qualitative research studies (Cronin, Ryan & Coughlan 2008). This systematic review employed a rigorous approach to identifying relevant and current research to inform the study.

According to Cronin, et al (2008), a systematic review should not only detail the time frame within which the literature was selected but should also, "use explicit and rigorous criteria to identify, critically evaluate and synthesize all the literature on a particular topic," (p. 39) as well as the methods used to evaluate and synthesize findings of the studies in question. In other words, for the reader to assess the reliability and validity of the review, the reviewer needs to present the precise criteria used to:

- Formulate the research question
- Set inclusion or exclusion criteria
- Select and access the literature
- Assess the quality of the literature included in the review
- Analyze, synthesize and disseminate the findings" (p. 39) □

Further to the above and in an effort to synthesize the literature, this review was concept-centric[4] and utilized a concept matrix (Appendix A) augmented with units of analysis (Webster & Watson, 2002).

Overview Paper 2: What competencies are necessary in navigating cross-cultural mentoring relationships for immigrant entrepreneurs? Five things skilled mentors think, say, and do

Mentoring within the world of work is often best examined *in the field* in order to investigate the contextual conditions, interpersonal interactions and the

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[4] Concept-centric – concepts determine the organizing framework of a review.

meaning of relationships from the perspectives of all stakeholders. In this study, understanding the cross-cultural mentorship of mentors and mentees involved gaining an understanding of their perspectives and experiences related to their respective relationships. The case study focused on the usefulness of this approach. Relevant questions asked included: what skills and/or competencies are beneficial to the mentor or mentee as they pertain to knowledge transfer and personal learning within the dyad, acculturation, and perceived business and network gains on the part of the mentee. In sum, the goal of the larger research project is to contribute to a broader understanding of cross-cultural mentoring and to provide practical utility to program administrators in their efforts to facilitate personal learning/knowledge transfer, program replication, business success, retention, and create the greatest likelihood of success for mentor dyads.

Case study is an empirical inquiry that "investigates a contemporary phenomenon within its real-life contexts, especially when the boundaries between phenomenon and context are not clearly evident" (Yin, 2003). For the purpose of this examination, case study methodology was utilized to facilitate a systematic investigation of the experiences of participants. Such efforts often lead to the formulation of specific hypotheses that may be formally evaluated or tested in subsequent research or evaluation projects. Case study approaches may employ a number of data collection techniques such as narratives, document reviews, key informant and focus group interviews, as well as the inclusion of more formalized and standardized measures (Yin 2003).

Participants

A purposeful sampling strategy was adopted for this research investigation. This involved selecting information-rich mentorship relationships cases that provide the means for learning about issues and concerns that were central to the major area of inquiry to this investigation (Patton, 2002). Given that there were limited numbers of locations from which to draw sufficient numbers of specific mentorship relationships that included a cross-cultural context, the Business Immigrant Mentorship Program (BIMP) offered in New Brunswick, Canada was selected as the setting from which to identify potential participants for this study. The BIMP is administered by five New Brunswick Canadian Chamber of Commerce/Board of Trade affiliates in their respective cities. The primary goal of this entrepreneurial mentorship program is to support business efforts by new immigrants in smaller cities with emerging immigrant populations – *new destination communities*.

Key Informant Interview Format

A semi-structured interview approach was used to carry out the key informant interviews. This format involved the use of a broad-based interview guide that included a list of areas of inquiry that were used for each interview event. The interview template also included example probes intended to encourage participants in their exploration of important perspectives and themes during the interview sessions. Although there was an established line of inquiry for the interviews, questions and probes were embedded in a conversational

interview approach with participants (Patton, 2002). The major areas of inquiry for the key informant interviews included:

- Sharing experiences related to mentorship interactions and activities
- Reflecting on the nature and quality of mentorship relationship
- Exploring lessons learned from participation in the mentorship relationship
- Investigating implications for enhancing the mentorship experiences for mentor and mentees interactions and relationships in the future

Procedure

Prior to the initiation of any data collection activities, completion of the university's ethics review process was completed. For this investigation active consent processes were implemented. Potential participants were informed of the study by a letter which included the purpose of the research, the data collection activities and the reporting of data. Recipients were invited to contact the researcher or the researcher's university supervisors with any questions or concerns about the study. Participants were then contacted by the researcher to answer questions they had regarding the study. Signed consent forms were obtained from participants.

After the completion of ethics review processes, individual key informant interviews were scheduled and completed. Execution of interviews were carried out in a comfortable area for participants that provided sufficient privacy and that minimized external distractions. Key informant interviews lasted approximately

one hour. For this research effort, all interviews were digitally recorded and subsequently transcribed.

Analysis of Data

All participants were provided with an identification number in order to maintain confidentiality. With respect to the key informant data, qualitative methods were applied to transform data into meaningful findings. As anticipated, hearing the actual testimonies of participants allowed access not only to descriptions and personal viewpoints, but also to insights regarding the meaning attached to participants' experiences (Merriam, 1988). Individual written summaries were merged to provide a unified data set. Analysis began at the point of data collection while taking time to memo, record and track analytical insights that emerged as interview data were gathered and analyzed. The analysis of key informant data provided the opportunity to describe the experiences of mentees in their respective relationships and to explore the nature of mentorship interactions and activities taking into account participants' perspectives of what was challenging, helpful and beneficial, and contributed to their personal and professional development.

Interviews were transcribed, then organized and translated into findings by a careful review of interview transcripts, by identifying any significant patterns, and by constructing a framework for communicating what the data revealed (Yin, 2003). Detailed individual and summary protocols were completed for each interview. Content analysis was used for identification of themes and findings. A process of inductive analysis provided the opportunity to

identify themes important to participants, to discover any patterns that connect said themes, and create coded categories for the purpose of organization. Following this initial analysis effort, emerging research themes were organized into major theme categories for each area of inquiry.

Overview Paper 3: Corporate mentorship programing: Promising practices for "fast-tracking" high potential employees

Initial data collection for a corporate mentorship program process evaluation was undertaken as part of the researcher's doctoral program. This research involved the review of several existing mentoring programs at XYZ Corporation (XYZ) to examine the consistency of program implementation; identify implementation challenges, accomplishments and solutions; identify essential mentoring content and approaches; and investigate mentoring processes and their impacts. Such evaluation activities make it possible to identify the strengths and challenges that influence a program's success. This process evaluation focused on the programs' written objectives, implementation activities and outcomes. The initial review utilized records from existing program processes, insights gathered through meetings with staff members, and data collected from program participants to synthesize information about program implementation and to evaluate process objectives. The initial evaluation activities were carried out over a 12-month period (September, 2011 – August 2012). For the purpose of this component of the dissertation, evaluation findings were synthesized with findings from the review of literature and better practices emerging from the other research components of this dissertation.

The initial process evaluation was undertaken to provide analyses that could inform the design of future XYZ mentoring programs. It was not intended to be perceived as a summative review, but rather as a formative evaluation designed to enhance understanding, identify areas for priority action, and buttress the efforts of XYZ to expand learning opportunities for employees, as well as to prepare for the planned retirement of the baby boom generation and to support the company with succession planning. In sum, the assumption of this evaluation was that the document review, interviews and surveys would provided an assessment of the overall program direction, and help identify information gaps to deepen and extend future program analysis activities.

Data were gathered through interviews with mentor/mentee participants, members of the Human Resource Division, and the review of program documents and materials. In collaboration with the XYZ Toronto and Montreal Human Resource offices, 24 potential mentees and mentors were identified. Thirteen mentees consented to participate in this data collection effort. Eleven were subsequently interviewed in person, one was interviewed by telephone, and one was unavailable. Three mentors agreed to participate and were subsequently interviewed. Areas of inquiry elicited these participants' perspectives on program intent and purpose, helpfulness, service gaps and recommendations.

The importance of including data collected from mentors, mentees and program administrators has been addressed by Allen, Eby, & Lentz (2008); only 18.2% of the studies included in their qualitative review represented research

using data collected from multiple sources. Of additional interest is that the protégé was the focus of inquiry in 80.2% of the studies. The mentor was the focus in 30.9%, and 27.5% of the studies focused on dyadic processes (e.g., cross-gender dynamics, mentor-protégé similarity). In sum, only 7.2% of the studies reviewed focused on the organization (Allen, et al., 2008), which speaks to the importance of the proposed process evaluation analysis to the examination of formal mentoring in the workplace.

Document Review

The intent of the document review was to examine key operational and relationship processes from in existing documents. This approach examined the documents in light of current research and identified promising practices in the field of mentoring. As such, a predominantly deductive framework approach was used to categorize and evaluate the relevant documents. The review was conducted using a customized template that extracted relevant sections from the documents and organized them according to indicators and evaluation questions. The quality and value of process documents were also evaluated.

Key Informant Interviews

The complexity of evaluating business initiatives often requires that research methods capture the rich, nuanced and varied personal feedback of individual cases or small-scale analyses. Correspondingly, this evaluation utilized *self-reporting* and employed both a retrospective survey questionnaire and one-on-one interviews; interview data enhanced the quantitative findings of the survey. Allen et al.'s (2009) comprehensive review of mentoring research

emphasizes the importance of context, noting that qualitative research on mentoring has substantial utility in understanding the potential of mentoring. This approach provided a forum enabling participants to give voice to what matters to them and why. The aforementioned strategies were implemented to address the epistemological challenges posed by participant recall. Specific themes that were investigated included:

- Meeting functionality, logistics and general details
- Activities typical to a meeting
- Personal/developmental benefits
- Knowledge transfer and personal learning
- Mentee/mentor perceptions
- Quality of mentorship programs

Managers and program designers were included as key informants. Quantitative data were collected via electronic surveys using Likert scales, as well as yes/no, radio and free text questions. Qualitative data collected through semi-structured interviews were coded to reveal emergent themes. Hearing the actual testimonies of the participants permitted access to descriptions and personal viewpoints that created context and elaborated on or extended the quantitative results; this approach substantiated the findings, since cross-referencing and comparisons were conducted between interview and survey data (Creswell, 2003). This approach aims to combine both qualitative and quantitative methods into a distinct research design or methodology, and has been gaining acceptance in the social sciences (Creswell & Clark,

2007). Moreover, the notion that the characteristics of a qualitative study are appropriate for the purposes of this research is supported by Merriam's (1988) comment that "in a qualitative approach to research the paramount objective is to understand the meaning of an experience" (p.16). Correspondingly, qualitative data was used in an effort to explain and expand upon the quantitative data collected.

Ethical Concerns

Ethics approval was obtained from the Research Ethics Board of the University of New Brunswick prior to initial data collection related to the process evaluation. Research processes adhered to the guidelines of the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans (Social Sciences and Humanities Research Council of Canada, 2000). Participants were made aware of their right to ask questions and withdraw from the study (without explanation or penalty) at any time. Special care was taken to keep all information private and confidential by (a) storing data in a locked filing cabinet at the University of New Brunswick, (b) giving only the research team access to data, and (c) maintaining the confidentiality of participants in the study.

Conclusion

In the workplace, mentoring is increasingly available so that individuals can create developmental relationships and networks that serve their unique career and developmental needs. It is a robust tool that offers a unique and holistic avenue to individuals who seek to learn new skills, gain new self-knowledge, build their performance and career capacities, and establish ongoing

personal growth throughout their adult life. In addition, it is the protégés' and mentors' self-awareness, empathy, and social skills that will affect what actually transpires in their developmental relationships, each of which will have a direct impact on the quality of the relationship, the development of human resource development, and ultimately the success of the corporation or the business. This research offers further insights into when and why participants perceive relationships to be high-quality and on the different manifestations and outcomes of interpersonal mentoring.

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Chapter III: What is cross-cultural mentoring? An integrative literature review and discussion of the term cross-cultural mentoring

Abstract

This paper examines 123 articles and how the term *cross-cultural mentoring* is used within the literature and research. Given the growing interest in cross-cultural mentoring, an integrative and analytical review of relevant mentoring literature is necessary. Currently, the broad literature on cross-cultural mentoring lacks agreement on what this construct represents; the lack of consistent terminology is counterproductive in terms of understanding the relevant processes and approaches. Rather than impose new construct definitions on the field, the goal of this paper is to present a clearer understanding of the extsting concepts and to promote better communication within the field. Thus, this research addresses the need for construct clarification by examining existing descriptions of common cross-cultural mentoring processes. The emerging research regarding cross-cultural mentoring is synthesized to identify variables and to discern the most pressing gaps. A critique of the state of cross-cultural mentoring literature is provided, and targeted suggestions are outlined to guide future empirical and theoretical work in a meaningful direction.

Key words: integrative literature review, cross-cultural mentoring, intercultural mentoring

Introduction

How many individuals have participated in cross-cultural mentoring? The answer depends on how the term is defined. It is difficult to specify precise incidence and prevalence data when terms used to describe cross-cultural mentoring are inconsistent. Such inconsistencies suggest that a great deal of conceptual confusion exists in the literature.

There is a need to better understand the meaning of cross-cultural mentoring for the field to advance with more certainty, clarity, and agreement. As the stream of cross-cultural mentoring research continues to infiltrate various academic disciplines (e.g., management, human resource development, training, adult education, nursing and psychology), the need for a comprehensive and analytical review is warranted to link the assorted genres of cross-cultural research, and to provide targeted direction for moving forward. Thus, this paper focuses on distinctions among the various uses and connotations of the term *cross-cultural mentoring.*

Rationale

Without aiming to account for every detail, one might summarize the issue as conceptual confusion. According to D'Abate, Eddy & Tannenbaum (2003), conceptual confusion occurs when descriptions of the same construct vary from author to author and is evident when exploring the similarities and

differences among the constructs. The problematic nature of how to label cross-cultural mentoring is tricky with respect to both detection and representation.

The frequent failure to agree on the term has consequences; the disagreement about the term hampers our ability to communicate about important professional issues leading to faulty generalizations or incomplete models and theories. If professionals within the discipline do not necessarily mean the same thing when using the term cross-cultural mentoring, imagine the confusion that can ensue when the discussion occurs across disciplines or among participants and program managers. Research that does not fully describe the characteristics of the study's participants and/or the program is limited in its ability to convey and capture which practices are likely to work for which cohort under which circumstances.

The typology presented here distinguishes among the two groups to which it is applied (e.g., [1] domestic and [2] international). In other words, the purpose of this paper is to explore various issues related to recognizing what type of *cross-cultural mentoring* is actually taking place. Focus is shifted to make a distinction among the various claims to the term among researchers. Four types of cross-cultural mentoring research are demarcated:

- that of visible minorities who share an understanding of how a country works because they were born and raised in the same country, but are of different cultural/racial backgrounds to the dominant population (e.g., Black, Hispanic, Asian, Aboriginal);

- that involving foreign exchange students, immigrants, expatriates or those new to a county;
- that between a mentor and mentee from different countries/cultural/racial backgrounds living in different countries. This scenario can be found in multi-national corporations, and
- that of pan-cultural utility which supplement or even supplant the extant mentoring literature which is predominantly Western/U.S./Anglo

In sum, cross-cultural mentoring is a new and emerging topic with contradictory reporting that would benefit from a holistic conceptualization and synthesis of the literature to date, leading to a comprehensive and categorized approach to the topic (Torraco, 2005).

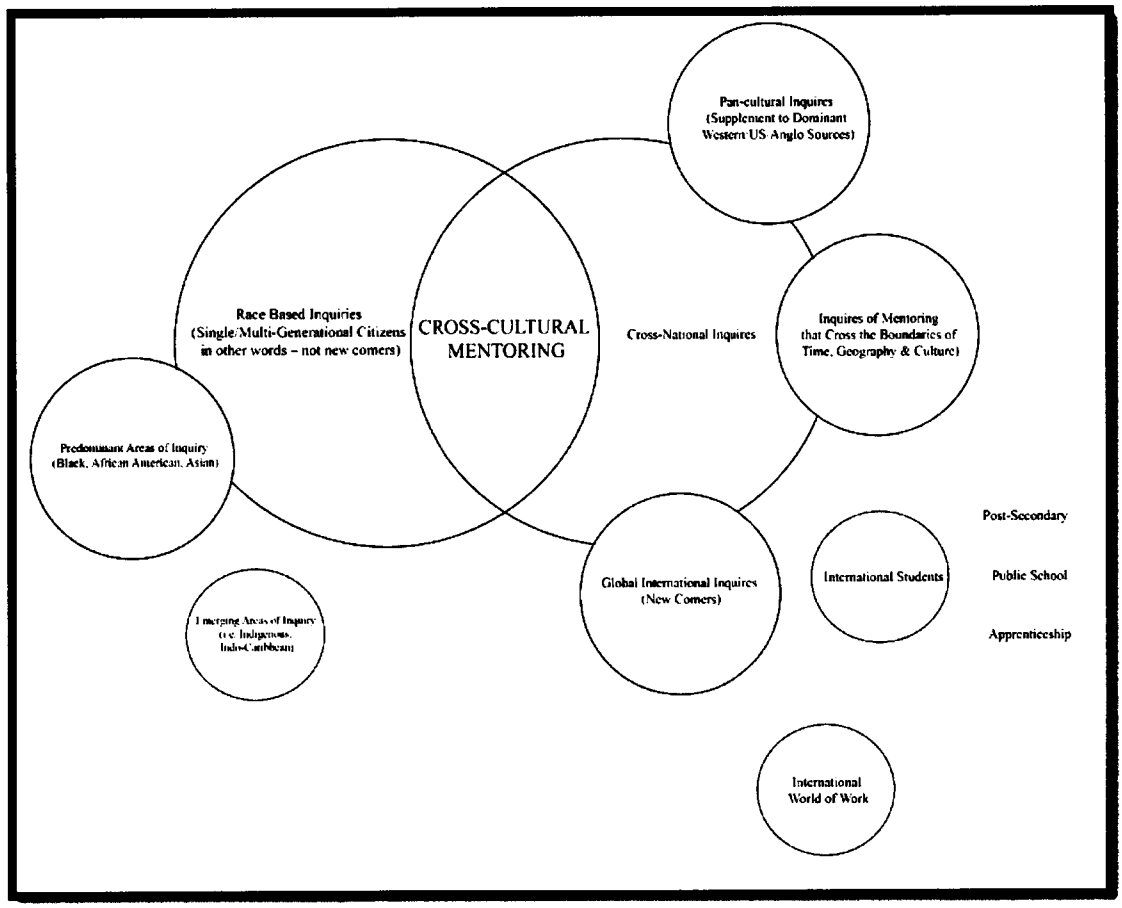

Figure 1 The Multiple Meanings Accorded to the use of Cross-Cultural Mentoring

Benefits of Research

In light of the trends toward economic globalization, increased immigration and workforce diversity, this research has, for example, the potential to provide valuable information to not only "domestic" same race/culture mentoring relationships, but also for immigrant and expatriate mentoring efforts as well as cross-cultural youth and faculty-student mentoring programs. For instance, the higher education market is continuously growing. According to *The Economist* article, "Will They Come?" (August, 2010), more than three million

students studying outside their home country. This represents a 50% increase over 2000 figures, and speaks to the potential usefulness of *cross-cultural* mentoring.

Literature Review

To clarify how cross-cultural mentoring is reported, an integrative literature review method is employed in order to (a) examine the multiple meanings accorded to the use of cross-cultural mentoring, and (b) explore the range of phenomena to which it refers, and (c) discuss the implications for professional practice (Torraco, 2005).

Literature reviews are appropriate when contradictory evidence appears, when there is change in a trend or direction of a phenomenon and how it is reported, and when new research emerges in different fields (Torraco, 2005). "Previous work [in any field is] always vulnerable. Criticizing is easy, and of little value;" according to Daft as cited by Webber and Watson. There is more value in explaining "how research builds upon previous findings rather than to claim previous research is inadequate and incompetent" (2002, p.660). Research on cross-cultural mentoring has suffered from fragmentation of the terminology or conceptual confusion in that the same construct varies from author to author.

The use of the term cross-culture mentoring in the articles citied within this review addresses cultural knowledge gaps, and examines the engagement of dyads that are culturally diverse. A review of the literature indicates most authors seem of the same mind in this regard. However, many include divergent assumptions regarding the "target" or the individual being mentored.

At the practical level the basic distinction in the term cross-cultural mentoring lies in the formation of the dyad; who is the mentor and who is the mentee, where were they born and/or raised, and what is their cultural and/or racial background. Two overarching categories have been delineated from the mentoring literature reviewed for this article.

Category One: Race-based Inquiries

Among the 185 articles included in this review, approximately 55 percent can be categorized as domestic race-based inquiries; that is, inquiries into the experiences of American-born individuals who are visible minorities with non-dominate cultural backgrounds, and who are not recent immigrants to the United States (US) (Achinstein, 2012; Brinson, & Kottler, Cervero, & Baugh, 2004; Butler, 2013; Chan, 2008; Clark, 2011; Cohen, Steele, & Ross, 1999; Dahlvig, 2010; Davidson, & Foster-Johnson, 2001; Dolan, 2007; Gentry, Weber, & Sadri, 2008; Hansman, 2003; Hoyt, 2013; Johnson-Bailey, Frels, & Onwuegbuzie, 2012; Ortiz-Walters, 2005; Redmond, 1990; Rhodes, 2002; Schlosser & Foley, 2008; Seepersad, Hagood-Elliott, Lewis, & Strickland, 2007; Stanley, & Lincoln, 2005; Thomas, 1993).

Within this category of articles, research often focuses on two or three domestic racial groups and is characterized by examinations of populations that are predominantly Black, Hispanic, and Asian (Barker, 2007; Blake-Beard, 1999; Blake-Beard, 2006; Bordes, et al., 2006; Coble, 2012; Davidson, 2001; Grant, 2012; Gormely, 2013; Hill, Del Favero, & Ropers-Huilman, 2005; Irvin, 2007; Johnson-Bailey, & Cervero, 2002; Kelly, 2012; Moore, Miller, Pitchford, & Jang,

2008; Payton, Howe, Timmons, & Richardson, 2013; Thomas, 1990; Thomas, 2001; Walker, Wright, & Hanley, 2001; Washington, Johnson, Jones, & Langs, 2007; Washington, 2012).

To a much lesser degree, other visible minority populations are present (Allen-Sommerville, 1994; Doston, 1996; 1994; Hedges, Seto, & Shiramizu, 2013; Sedlacek, Benjamin, Schlosser, & Sheu, 2007; Shadduck-Hernandez, 2006; Thomas, 2001; Walker, 2006). This literature is sometimes classified by the author as multicultural, as in *Mentoring within the field of counseling: A preliminary study of multicultural perspectives* (Chung, Bemak, & Talleyrand, 2007), diverse (Achinstein, 2012; Johnson, Xu, & Allen, 2007; Schlosser, Talleyrand, Lyons, Kim, & Johnson; 2011) as in *Recruiting and Retaining a Diverse Faculty in a Public University* (Wilkinson, 2007) or ethnic (Rhodes, 2003; Sánchez, & Colón, 2005).

Several of these studies on cross-cultural mentoring in the workplace have reached the troubling conclusion that protégés in cross-cultural mentoring dyads receive less career and/or psychosocial support than protégés who have mentors who are culturally similar to them (Dreher, & Cox, 1996; Feldman, Folks, & Turnley, 1999; Thomas, 2007; Thomas, 1990). These results point to the saliency of race and culture in mentoring relationships and the need for mentor competency in navigating cultural differences. Others have published findings to the contrary (Thomas, 1990). Yet, others have compared the effects of same- vs. cross-race matches and have asked questions regarding the

relative importance of making matches on the basis of shared racial background (Rhodes, Reddy, Grossman, & Lee, 2002).

Domestic race-based mentoring also includes research examining how Western knowledge meets Indigenous knowledge. The relevant studies originate from Canada, the US, Australia and New Zealand (Bulman, & Hayes, 2011; Jones, 2013; Strong, 2013; Thomas, Gray, & McGinty, 2011; Ware, 2013). Santoro's (2007) article, for example, explores how teachers who are not from the Anglo-Celtic Australian 'mainstream' use their cultural knowledge and experiences as 'other' to develop deep understandings of ethnic minority and/or Indigenous students and discusses their potential to act as cross-cultural mentors for their 'mainstream' colleagues. In the US, Salzam (2000) analyzes a project designed to increase the multicultural competency of American graduate counseling students to serve the interests of Native American students as defined by Native American educators in an urban school district. This research, falls within the "domestic" cross-cultural mentoring category, in the sense that all parties involved were born and raised in the same county and are not new comers.

Category Two: International or Cross-national

The second overarching cross-cultural mentoring category could be categorized as international or cross-national. Within this category there are three subsets.

First, there is emerging research examining mentoring in an effort to supplement the extant mentoring literature that has taken a predominantly

Western/US/Anglo perspective and will increase pan-cultural utility (Chen, & Chen, 2010; Chen, Liao, & Wen, 2013; Chukwu, & Uzochukwu, 2013; Darling, Hamilton, Toyokawa, & Matsuda, 2002; Erasmus, & Goldman, 2013; Etwire, et al., 2013; Johansson-Fua, Ruru, Sanga, Walker, & Ralph, 2012; Graciela, Quintana, & Parra Zambrano, 2013; Gormely, 2013; Guerrero, Bermudez-Cañete, & Alvarez, 2012; Halai, 2006; Idemudia, 2013; Kim, & Egan, 2011; Kochan, & Pascarelli, 2003; Marshall, & Shaver, 2010; McCorkel-Clinard, & Ariav,1998; Mortenson, 2006; Ndunge Ndeke, & Aloka, 2013; Price, 2009; Radu Lefebvre, & Redien-Collot, 2013; Ruru, Sanga, Walker, & Ralph, 2013; Smith, & Spiteri, 2013; Tor, et al., 2011; Wang, 2001). In 2011, Hu, Pellegrini and Scandura, examined cross-national variability by assessing the measurement equivalence of the Mentoring Functions Questionnaire (MFQ-9) across two diverse cultural settings, the US and Taiwan; Ramaswami, (2013, 2010) in separate studies examined India and Taiwan; Buyukgoze-Kavas, Huang and Drehe, (2010) and Centin, Kizil and Zengin, (2013) expand the scope to Turkey; and Vazsonyi and Sniders's (2008) study was undertaken with similar objectives; that is, to explain cross-national variability in mentoring but the scope is larger and examines mentoring within the constituency of European apprenticeships. Vazsonyi and Snider (2008), contrast, for example, Switzerland/US apprenticeship practices in an effort to explain adolescent adjustment. Likewise, Bright's (2005) study demarcates Japanese cultural characteristics that support mentoring as a relationship, as opposed to the West, whose favoured approach is to view mentoring as a strategy.

Each of these examples attempts to illuminate cross-national variabilities in mentoring, and in doing this authors lend global perspectives on the utility of the efforts of mentors and mentees. This research offers insights into the value of creating a shared language for discussing mentoring relationship development, while at the same time acknowledging the specific impact that cultural differences play in shaping mentoring processes (Kochan, & Pascarelli, 2003a; Kent, Kochan, & Green, 2013).

Second, there is limited research examining the experiences of dyads living both in different countries and from different cultures; in other words, mentoring relationships that cross boundaries of time, geography, and culture and that are increasingly enabled by technological developments (Philippart, & Gluesing, 2012). As illustrated in *Cross-Cultural E-Mentoring to Develop Social Construction of Knowledge* (Richmond, 2009) mentoring itself requires different strategies to develop an effective partnership and additional complexities arise when virtual mentoring is global and cross-cultural. Focusing on the experiences of Sri Lanka (faculty from universities and professional organizations) and America (graduate students at the University of New Mexico) the authors makes important contributions to both e-mentoring and cross-cultural mentoring research.

Lastly, the ***third*** and largest subset within the category of global or international mentoring is the intersection at which immigrants/foreign expatriates/sojourns and cross-cultural mentoring, for example, meet. While this subset may be categorized as cross-national, immigrants may offer a technical

exception as at some juncture they change nationalities. This subcategory can be sub-classified as following:

Students (post-secondary/public school/apprenticeship)

Viewed as an important component for youth and young adults' social support structure, mentoring has grown in popularity and use. The articles within this subset discuss the implications of mentoring (1) for the retention and engagement of post-secondary international students (Chamberlin-Quinlisk, 2005; Greenberger, 2013; Park-Saltzman, Wada, & Mogami, 2012; Plummer, & Nyang'au, 2009; Sahin, 2008; Seepersad, 2012; Woods, et al., 2013); (2) for immigrant students, many of whom have difficulty in the public school systems (Diversi, & Mecham, 2005; Ford, 2004; Liang, & Grossman, 2007; Sanchez, & Reyes, 1999); and there is also limited research examining the implications of mentoring for (3) international internships in which mentoring is a component (Feldman, et al., 1999; Koskinen, & Tossavainen, 2003).

International World of Work

International work assignments are challenging, and other articles discuss the implications of mentoring for newcomers or expats within the international world of work, and point out the importance of psychosocial and cross-cultural transition support in expatriates' success during the pre-departure, expatriation, and the repatriation phases (Abbott, et al., 2006; Bittmann, 2011; Bogar, 2012; Bohanan, 2010; Carraher, Sullivan, & Crocitto 2008; Crocitto, Sullivan, & Carraher, 2005; Mezias, & Scandura, 2005; Osula, & Irvin,2009; Rainoldi, & Lolzner, 2012; Shen, & Kram, 2011). For example, Shen and Kram

(2011) examine the impact of host-country mentors upon expatriate effectiveness, and Carraher, et al. (2008) examine the comparative impact of having both home- and host-country mentors for expats. Each study highlights the unique characteristics of expatriates' developmental networks in cross-cultural contexts including the nature of cross-border and culturally diversified network structures, the dominance of psychosocial support, and the importance of cross-cultural transition support. The financial cost associated with expatriations for multinational corporations (MNA's) as well as premature repatriation episodes are estimated to be between $2 and $5 million US dollars (Haile, Jones, & Emmanuel, 2007).

Many individuals become expatriates on their own initiative and outside the boundaries of multinational corporations, however. Correspondingly, Bozionelos (2009) and Bohanan (2010) consider the largely neglected field of individuals who become *expats* on their own and the implications of cross-cultural mentoring for these individuals. These results shed light on the factors that help determine the success of non-corporate-sponsored expatriates or those who have boundaryless careers and have implications for practice and future research.

One thread that is often present in this international or global category of literature is the different emphasis that is placed on the mentor. For newcomer mentees, mentors can be likened, for the most part, to a "natural" resource offering instrumental support as well. They are veritable "wells" of information resources for their mentees regarding the introduction to and familiarization with

their new environment – an environment that consists of unwritten rules, conventions, norms and practices that are not readily accessible to newcomers, who often lack invaluable connections and resources. Mentors hold the position of cultural *insider,* and the mentee can leverage the mentor's knowledge during the process of becoming accustomed to and acclimatized with their new home.

Among the two overarching cross-cultural mentoring categories (domestic and global or international), and the various sub-categories (e.g., black, aboriginal, expat, exchange-student), there is little to no standard delineation. The confusion in criteria inevitably leads to faulty generalizations or incomplete models and theories. Clarifying the meaning of cross-cultural mentoring and generating an overarching framework for understanding the similarities and differences among research can address some of the conceptual confusion in the literature. Rather than impose new definitions, the goal of the current research is to use existing descriptions of the construct to create a snapshot of how current cross-cultural mentoring interactions are understood and to appeal for concise labelling of research efforts. Key word listings were imprecise. Of the articles amassed, it was necessary to read well beyond the abstract to understand who the mentees and mentors were and where they were from.

Research Methods

An integrative review, the broadest type of research review method, was used allowing for the inclusion of not only diverse methodologies, but also the contribution of varied perspectives on the phenomenon of concern (Whittemore, & Knafl, 2005; Torraco, 2005). According to Whittemore and Knafl (2005), the

varied "sampling frame of integrative reviews in conjunction with the multiplicity of purposes has the potential to result in a comprehensive portrayal of complex concepts, theories, or [problems]".

Domain and Selection Criteria

This review primarily focuses on empirical findings published in peer-reviewed journals and was not limited to a specific time range; publications in diverse although relevant disciplines have been included. Several methods were used to identify appropriate articles. First, a systematic search of the University of New Brunswick World Cat online databases including CINAHL, Eric, Business Source Premier and PsycINFO, Academic Search Premier, Scopus, and the WEB of Science was undertaken. This review focused on cross-cultural mentoring using the terms *cross-cultural OR cross-ethnic OR cross-race and mentoring.* Manual searches of journals that commonly publish articles on mentoring (e.g., *International Journal of Mentoring and Coaching*, and *Mentoring & Tutoring: Partnership in Learning*) were also conducted. Other articles included in the review are attributable to a Google Scholar alerts. Approximately 200 articles and other works were reviewed and 123 articles and other works were identified for inclusion in this review.

Each article was independently coded and analyzed using a staged review process (i.e., an initial review of title, keywords and abstract; followed by an in-depth scan) (Torraco, 2005). The mentoring literature was reviewed simultaneously to generate a list of the common descriptive characteristics related to the construct of cross-cultural mentoring. A constant comparison

method was used to convert extracted data into systematic categories, facilitating the distinction of themes (Whittemore, & Knafl, 2005).

In an attempt to distinguish among the various uses and connotations of the term *cross-cultural mentoring*, it is important to acknowledge the imprecision of how the term is used and who falls under or within the term. The development of the coding scheme came from study characteristics that would help in understanding the state of cross-cultural mentoring from a general content perspective.

Results

A concept matrix augmented with units of analysis (Webster, & Watson, 2002) provided a mechanism for exploring confusion in the literature about the meaning of cross-cultural mentoring and isolating concepts. As discussed below, the matrix illustrates that different, contradictory labeling is used to describe cross-cultural mentoring. By using a network matrix to explore these inconsistencies, researchers can direct their research toward clarifying contradictions about the meaning of the construct (Appendix A).

Discussion

This confusion seemingly paints a bleak picture of the current state of cross-cultural mentoring research. However, it is important to consider that this may simply reflect an area of research that is still at a relatively early stage of development. In order to ensure the advancements of this field of study, it is timly to begin a dialogue regarding an agreed-upon use of the term.

Not discussed earlier is perhaps a greater and more foundamental issue. The concern is that we may not even be discussing the correct term. What do you do when the "experts" get it wrong? Cross-cultural mentoring is, by a large margin, the term of choice but it turns out it may be the wrong term used in the wrong way. The correct term may in fact be *intercultural mentoring*.[5] Cross-cultural means to compare and contrast two cultural groups; *intercultural* is what happens when the two or more culturally-different groups come together, interact and communicate. Intercultural is a symbolic, interpretative, transactional, contextual process, which implies the engagement of culturally-different people. Cross-cultural communication on the other hand, is the study of a particular idea or concept within many cultures...in order to compare one culture to another (Lustig, & Koester, 2010).

Beyond the issue of jargon, it is instructive to review the variety of perspectives that influence and will influence cross-cultural mentoring. Mentoring relationships investigating American-born black/white or visible minority participants in America represent by far the most prevalent research foci. To a lesser degree, research has focused on newcomers, who are often but not necessarily, visible minorities in their adopted cultures.

Overall, findings suggest that, in the absence of clarity, cross-cultural mentoring lacks agreement on what this construct represents; the lack of

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[5] In repeating the literature scan using the same data bases as above and using the term *intercultural mentoring* SCOPUS and the Web of Science each brought up the same single article, Digital Dissertations delivered 2 dissertations.

consistent terminology is counterproductive in terms of understanding the relevant processes. Correspondingly, inconsistent use of terminology is standing as a barrier to the ability of individual research studies to coalesce into a more meaningful body of literature.

Future Research

Traditionally, adult mentoring has been about developing talent. I would suggest that in the future this will expand in that mentoring will not only be about mentoring the talented but also about including the excluded. Therefore, cross cultural mentoring research will expand to examine gender/sexual orientation/sexuality (Wilkinson, 2007), age, religion, physical ability/ability status, corporate/institutional culture and other aspects of difference in efforts at valuing and embracing diversity (Ragins, 2007). Correspondingly, generalizations regarding the term need to be used cautiously.

The interconnectedness of global and domestic organizational needs suggests that the need for cross-cultural mentoring will be increasing, not decreasing, if the profession can deliver culturally responsive programs and research. Given the growing climate for cross-cultural mentoring, I speculate that the future trends in this area include the following:

- Cross-cultural approaches will grow in their influence on the design and implementation of mentoring initiatives.
- Multicultural teams will be targets for cross-cultural mentoring programing.

- Cross-cultural mentoring will gain acceptance as a precursor or substitute for "general mentoring," especially in global corporations.
- The importance of culturally-related communication styles on productivity and teamwork will increases the demand for cross-culture mentoring.
- Organizations will demand new strategies and instruments to expand and buttress best practices related to cross-cultural mentoring.
- Cultural diversity will increasingly become a criterion for the selection of corporate mentors, replacing the current trend toward assigning this role to white males.
- Cross-cultural mentoring will become the strategy of choice to share the concepts, attitudes, and skills necessary for effective cross-cultural interactions.

It is anticipated that the knowledge generated by this research effort will contribute to understanding the social and cultural integration of newcomers and minorities into a multicultural or pluralistic society. However, this area of inquiry is in need of targeted examination, particularly in terms of how cross-cultural differences can be negotiated, and what skills and/or competencies are required of the mentor and mentee to influence dyadic relationships.

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Chapter IV: What competencies are necessary in navigating cross-cultural mentoring relationships for immigrant entrepreneurs?

Five things skilled mentors think, say, and do

Abstract

Humans are defined by culture, which is profound in its nature. As a rule, most of us are woefully underprepared to deal with cultural diversity. We are not naturally equipped to separate ourselves from our culturally-based ethnocentric viewpoints. The very essence of one's unique background and developmental experiences limits our ability to separate ourselves from our own cultural backgrounds and biases in order to understand the behaviour of others around us. However, as inadequately as we are equipped, most of us do try.

This chapter provides an overview of cross-cultural[6] mentoring literature, and includes a description of a research study that makes two main

[6] The term cross-cultural has been adopted as the colloquial term when referring to intercultural, and the two terms are at times used interchangeably. Cross-cultural is defined as the "comparison of cultural differences or situations in which such differences exist"(Stewart, E & Bennett, M., 1991, p. xii). In contrast, the term intercultural is used to describe the "actual interaction between people of different cultures" (p. xii). This paper employs the term cross-

contributions to cross-cultural mentoring literature. First, it will describe the skills and/or competencies that have been reported as beneficial by immigrant mentees as they pertain to cross-cultural mentoring practice for immigrant entrepreneurs. Second, it will highlight the importance of psychosocial and cross-cultural transition support in immigrant entrepreneur relocation success.

Effective integration measures for both immigrants and *welcoming communities* are increasingly vital when overlaid upon past decades and future immigration trends. The total number of international migrants has increased over the last 10 years from an estimated 150 million in 2000 to 214 million (UN, n.d.). Australia, New Zealand, Western Europe, and the United States of America are also experiencing rapid immigration growth. In 2010 for example, nearly 40 million of the approximately 309 million residents of the United States (US) were foreign born, a 28 percent increase over 2000 census numbers. Between 2000 and 2010, over 13 million immigrants settled in the US. Continuing the United States' long history with immigration, and assuming an absence of policy change, it is projected that 30 million new immigrants will settle in the US over the next 20 years (Camarota, 2012).

In Canada, where this research originates, we have welcomed almost 1.9 million (1,863,791) new permanent and temporary residents (2005-2010). Since

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cultural mentoring in its colloquial form and portrays the interactive relationship when mentor and mentee come from different cultures.

2001, two-thirds of the country's population growth has been due to immigration, making Canada the fastest growing country in the G8 (OECD, 2010). Of this number, sixty percent were economic immigrants (selected on their ability to establish themselves economically in Canada through entrepreneurial activity, self employment or direct investment (spouse and dependents are also counted). In fact, from 2004-2007 the number of small businesses owned by recent immigrants – defined here as those who have resided in the country for fewer than five years – increased by 117% (Downie, 2010).

In order to succeed, recent immigrants must learn how to interact effectively in a completely new environment where people think, feel, act differently, and often speak a different language. To this end, entrepreneurs often have to deal with significant barriers in starting and maintaining their businesses (St-Jean, 2009). Among these challenges are the well-researched financial challenges faced by all entrepreneurs – including lack of financial capital (Fisher, 2010) and moving to non-traditional immigrant-receiving communities or *new gateway communities* which contain many obstacles that limit their chances of fully participating in the economy (Price, 2009). These problems are further compounded by a lack of social integration or existing networks, leading to insufficient knowledge of their new business milieu; the economic and social environments; legislation and regulations; and the labour market (Brenner, Filion, Menzies, Perreault, & Ramangalahy, (2003); Brenner, Menzies, Dionne, & Filion, 2010; Ley, 2003; Light, 1984, 2004; Rath &

Kloosterman 2000). This deficiency influences not only marketing, for example, but also ways of locating potential customers in a market about which little is known. Research indicates that immigrant entrepreneurs' are generally unprepared for the economic climate they encountered because business skills they have may not be transferrable from one cultural or economic and regulatory setting to another Finally, these individuals may also struggle with making themselves known and developing positive reputations within the new business community (Brenner, et al., 2010; Light, 2004).

In summary, immigrant entrepreneurs often face significant challenges both within and beyond the work context and according to Downie (2010), too many face "onerous and unnecessary" obstacles that limit their chances of fully participating in the economy. Within such communities, the institutional and cultural resources to deal with immigrant diversity are just emerging.

Purpose

The purpose of this chapter is to share with others data collected from immigrant mentees participating in a program for immigrant entrepreneurs living in *new gateway communities* or smaller cities with emerging immigrant populations. The study focuses on the usefulness of this approach and impressions held by the mentees; relevant questions asked include: What skills and/or competencies are beneficial to the mentor or mentee as they pertain to knowledge transfer and personal learning within the dyad, acculturation, and

perceived business and network gains on the part of the mentee? In sum, the goal of the larger research project is to contribute to a broader understanding of cross-cultural and to provide practical utility to program administrators in their efforts to facilitate personal learning/knowledge transfer, program replication, business success, retention, and create the greatest likelihood of success for mentor dyads.

Significance

In general policy terms, expanding immigration trends create an immense human service challenge to respond to the needs of ethnically diverse immigrants. In order to succeed, recent immigrants or sojourners must learn how to interact effectively in a completely new environment where people think, feel, act differently, and often speak a different language. In light of the ongoing move toward economic globalization, immigration trends and workforce diversity, this research has the potential to provide valuable information not only for new immigrants, sojourners or expatriate workers, but also for mentoring efforts directed at cross-cultural youth and faculty-student mentoring programs catering to international students.

Program Context

The unit of analysis for this study was the Business Immigrant Mentorship Program (BIMP) offered in New Brunswick, Canada. The mentor pool is comprised of volunteers from the Chamber of Commerce. The BIMP Program is

unique in North America incorporating both market principles and an ideology of volunteerism. At its launch in 2008, New Brunswick was the only jurisdiction offering universal support to immigrant entrepreneurs living in new gateway communities. The program, which is now available at five sites in the province, is made possible by the support and funding of the Government of New Brunswick's Population Growth Division - Immigration Branch (Government of New Brunswick, 2014).

The primary goal of this entrepreneurial mentorship Program is to support business efforts by new immigrants in new gateway communities. Equally important to this effort, however, is the development of social capital. Ethnic enclaves in small town Canada are scarce and new immigrant entrepreneurs are unable to draw on ties to co-ethnics. Correspondingly, the limited or lack of social integration and/or existing networks lead to insufficient knowledge of the new business milieu. The Business Immigrant Mentoring Program endeavours to alleviate this predicament.

Portes and Dewind (2004) argue that this awareness of shared membership, an element that mentoring provides due to its nature, has the capacity to be instrumental to the development of social capital for immigrants. Hence, for newcomers, mentoring relationships can be particularly critical in terms of facilitating integration as well as encouraging persistence.

Mentor-driven networks can develop trust between members and

redefine self-interest to consider the group as a whole. Members may then choose to expand their identity to gain access to benefits (Roccas, 2002). The development of trust within and among networks further encourages access to benefits through the promotion of resource exchanges (Besser & Miller 2011). However, existing scholarship examining immigrants' first two years of residency on the East Coast of Canada, predicts in part that those least involved in structured groups and/or organizations are the most likely to move out of provinces in other regions of the country. *Movers* participate in roughly half as many different types of groups or organizations (45%) as compared to *stayers* (81%) (Ramos, 2011). Those who feel isolated and lack a sense of belonging are most at risk of leaving – mentoring has the potential to combat this challenge.

Logistics of the Program – Mentoring Activity

During the first year of the BIMP pilot, the mentorship model was developed; it served as a template for the BIMPs that followed. Mentoring, as a system of support, appears to be a natural fit for Chamber of Commerce affiliates in New Brunswick. Due to the care and attention of all involved, it is not a "program" so much as it is a relationship. The relationships are traditional one-on-one longer-term five-month commitments that are continuous and intense personal and professional interactions.

Participants commit to a minimum thirty hours over a period of five

months; this time commitment is, however, a guide and most dyads exceed it. There is also pre-program and during program training, a debrief session and an alumni group that mentees can join upon completion of the BIMP. Mentee participants are also invited to Chamber and other community events. The program coordinator provides communication and relationship support as necessary, and conducts regular *check-ins*. Mentors and mentees are advised to contact the coordinator at any juncture during the relationship with questions or concerns.

Literature Review

Despite the number of studies in related subfields of mentoring, only limited research has focused on mentoring through a cross-cultural or inter-cultural lens where the mentee is a recent immigrant (Crocitto, Sullivan, & Carraher, 2005; Kochan, 2002; Kochan, & Pascarelli, 2003; Kent, Kochan & Green (2013); Philippart & Gluesing, 2012). Furthermore, mentoring programs to support immigrant entrepreneurs in new destination communities are generally lacking. Mentoring can help new immigrant entrepreneurs develop new networks, unleashing a wealth of knowledge residing within experienced and local entrepreneurs.

Mentoring research has examined a number of important contextual variables such as race and gender (Blake-Beard, 2009; Greenberger, & Wang, 2002; Kram, 1985; Noe, Greenberger, & Wang, 2002; Ragins, & Scandura,

1999). However little research exists that examines cross-cultural mentoring where the protégé is a recent immigrant. Acknowledgment of this is important because while there may be significant research and theories on the topic of formal mentoring in the workplace and increasing examination of domestic cross-racial mentoring, few studies directly examine the implications of mentoring for new immigrants. That is, inquiries into the experiences of individuals born in the US who are visible minorities with non-dominant cultural backgrounds, and who are not recent immigrants to the US.

Scan of Cross-cultural Mentoring Literature

Research on cross-cultural mentoring has suffered from fragmentation of the terminology or conceptual confusion, in that the same construct varies from author to author. Moreover, there are divergent assumptions regarding the "target" or the individual being mentored. At the practical level, the basic distinction in the term *cross-cultural mentoring* lies in the formation of the dyad: Who is the mentor and who is the mentee? Where was the mentee born and/or raised, and what is their cultural and/or racial background?

Predominately, articles researching cross-cultural mentoring are authored by US researchers and can be categorized as "domestic" race-based inquiries (Frels, & Onwuegbuzie, 2012; Gentry, Weber, & Sadri, 2008; Redmond, 1990; Rhodes, Reddy, Grossman, & Lee, 2002; Schlosser, & Foley, 2008; Stanley, & Lincoln, 2005; Thomas, 1993). Thus, such research is characterized by

examinations of populations born in the US that are predominantly Black, Hispanic, and Asian (Blake-Beard, 2006, 1999; Davidson, & Foster-Johnson 2001; Walker, Wright, & Hanley 2001; Washington, Johnson, Jones, & Langs, 2007).

To a much lesser degree, other minority populations are also present (Allen-Sommerville, 1994; Doston, 1996; Grant, Decuir-Gunby, & Smith, 2010; Frels & Onwuegbuzie, 2012). This literature is sometimes classified by authors as multicultural, as in *Mentoring within the field of counselling: A preliminary study of multicultural perspectives* (Chung, Bemak, & Talleyrand, 2007); or refers to "diversity," as in *Recruiting and Retaining a Diverse Faculty in a Public University* (Wilkinson, 2007) or ethnic (Sánchez, & Colón, 2005).

Domestic race-based mentoring also includes research examining how Western knowledge meets indigenous knowledge. Relevant studies originate from, for example, Canada, the US, Australia and New Zealand (Bulman, & Hayes, 2011; Jones, 2013; Santoro, 2007; Strong, 2013; Thomas, 2001; Ware, 2013). Such research also falls within the "domestic" cross-cultural mentoring category, in the sense that all parties involved were born and raised in the same country as opposed to being newcomers.

The second overarching cross-cultural mentoring category, and of primary interest to this study, could be categorized as *international, global or cross-national.* Within this category there are two subsets:

a) Emerging research examining mentoring in an effort to supplement the extant mentoring literature that has taken a predominantly Western/U.S./Anglo perspective in order to increase pan-cultural utility

This work attempts to explain cross-national variations in mentoring to lend perspective to global practitioners on the utility of the efforts of mentors and mentees, and to support the efforts of mentoring program developers (Carraher, Sullivan, & Crocitto, 2008; Chen, & Chen, 2010; Darling, 2002; Kim, & Egan, 2011; Marshall, & Shaver, 2010; McCorkel-Clinard, & Ariav, 1998; Mortenson, 2006; Price, & Chacko, 2009; Ramaswami, & Dreher, 2010; Tor, Goh, Ang, Lim, Winslow, Ng, et al., 2011; Wang, 2001). This study offers insights into the value of creating a shared language for discussing mentoring relationship development, while at the same time acknowledging the specific impact that cultural differences play in helping to shape mentoring processes.

b) Emerging research examining the intersection at which immigrants/foreign exchange students/expatriates and cross-cultural mentoring meet involving foreign-born individuals immigrants and temporary sojourners.

Articles discussing the implications of mentoring for the retention and engagement of international students include the work of Chamberlin-Quinlisk (2005), Park-Saltzman, Wada and Mogami (2012), Plummer and Nyang'au (2009) and Sahin (2008) as well as the work of Diversi & Mecham (2005) focusing on immigrant students. There is limited research examining

international internships in which mentoring is a component (Feldman, Folks, & Turnley, 1999; Koskinen, & Tossavainen, 2003).

Other articles discuss the implications of mentoring for newcomers or expatriates within the international world of work, and point out the importance of psychosocial and cross-cultural transition support in expatriates' relocation success (Abbott, Stening, Atkins, & Grant, 2006; Bohanan, 2010; Bittmann, 2011; Carraher, 2008; Shen, & Kram 2011). For example, Shen and Kram (2011) examine the impact of host-country mentors upon expatriate effectiveness, and Carraher, et al., (2008) examine the comparative impact of having both home- and host-country mentors for expatriates.

Each of these studies highlights the unique characteristics of expatriates' developmental networks in cross-cultural contexts including the nature of cross-border and culturally diversified network structures, the dominance of psychosocial support, and the importance of cross-cultural transition support. Many individuals become expatriates on their own initiative and outside the boundaries of multinational corporations, however. Correspondingly, Bozionelos (2009) and Bohanan (2010) consider the largely neglected field of individuals who become autonomous expats and the implications of cross-cultural mentoring. These results shed light on factors that help determine the success of non-corporate-sponsored expatriates.

There is among the two overarching cross-cultural mentoring categories (domestic and global, international or cross-national), and the various sub-

categories (e.g., black, aboriginal, expat, exchange-student) little to no standard delineation. The confusion in criteria outlined above inevitably leads to faulty generalizations or incomplete models and theories. In an attempt to distinguish among the various uses and connotations of the term *cross-cultural mentoring*, it is important to acknowledge the imprecision regarding how the term is used and who falls under or within the term.

This confusion seemingly paints a bleak picture of the current state of cross-cultural mentoring research. However, it is important to consider that this may simply reflect an area of research that is still at a relatively early stage of development. In order to ensure advancements in this field of study, the time has come to begin a dialogue regarding an agreed-upon use of the term.

Overall, findings suggest that in the absence of semantic clarity, researchers lack agreement on what the construct of cross-cultural mentoring represents; the lack of consistent terminology is counterproductive in terms of understanding the relevant processes. Correspondingly, inconsistent use of terminology is standing as a barrier to the ability of individual research studies to coalesce into a more meaningful body of literature.

Scan of Cross-Cultural Mentoring for Newcomer Entrepreneurs

It is not surprising then, that the limited ability of all entrepreneurs to face the challenges inherent in launching a business has been identified as the main factor in the high failure rate of new businesses (Brenner, 2010). Few studies

have focused on how issues facing entrepreneurs are navigated in mentoring relationships (Ensher, 2000; St-Jean, 2009), and fewer still when immigrant entrepreneurs are included in the literature scan (Chan, 2008). Although mentoring research has examined a number of important contextual variables such as race and gender (Kram, 1985; Noe, 2002; Ragins, 1999), several studies on cross-cultural mentoring in the workplace have reached the troubling conclusion that protégés in cross-cultural mentoring dyads receive less career and/or psychosocial support than protégés who have mentors who are culturally similar to them (Dreher, 1996; Feldman, 1999; Thomas, 2007; Thomas, 1990). These results point to the saliency of race and culture in mentoring relationships and the need for mentor competency in navigating cultural differences.

It is anticipated that the knowledge generated by this research effort will contribute to understanding the role of social policy in promoting the social and cultural integration of newcomers and minorities into a multicultural or pluralistic society. However, this area of inquiry is in need of targeted examination (Brenner et al., 2010), particularly in terms of how cross-cultural differences can be negotiated and what skills and/or competencies are required of the mentor and mentee to influence cross-cultural mentoring relationships (Chi-Ying, Bemark, & Talleyrand, 2007).

Calls for research on the topic of cross-cultural mentoring within formal hierarchal dyadic mentoring relationships can be attributed in varying degrees to the fact that:

- Research focuses on one or two ethnic groups in particular, and therefore provides only partial knowledge of immigrant entrepreneurship (Sharif, 2009).
- Even where the study sample includes several ethnic groups, these studies are based in urban centres with ethnic enclaves (Blake-Beard, 2009; Thomas, 2001).
- Research often concentrates on new destination immigrants as workers, resulting in a dominant view of immigrants as primarily a labour supply rather than as entrepreneurs (Zarrugh, 2007).
- Researchers have tended to focus on the characteristics of the entrepreneurs themselves, leaving aside detailed assessment and evaluation of Programs.
- Researchers have yet to determine if trust vis-a-vis mentoring can be found to be related to increased perceptions of business benefits, increased resource exchanges, and network sustainability.
- White males occupy the "predominant mentoring class"; in other words, business owners.
- Entrepreneurial mentoring tends to lag behind organization research (Bisk, 2002).

In summary, a key challenge for research on mentoring is to move beyond the faulty assumption that the experience of race or culture does not shape, alter or drive the mentoring relationship. Thomas (2001) encourages

scholars to acknowledge that within their own mentoring research, it is inappropriate to assume that the experiences of one group adequately and accurately capture the experiences of other groups. With a few exceptions, mentoring models have been defined based on the experience of one dominant racial or ethnic group and not multi-group membership. Thomas (2001) and others (Blake-Beard, 2009; Blake-Beard, Murrell & Thomas, 2006) call for research that can articulate the authentic dynamics of mentoring in diverse relationships.

Data Collection and Analysis

Better practice research is a method of investigation emerging from the need for applied research that attempts to identify high impact, low cost interventions for real-world problems. This methodology recognizes evidence-based practices, and takes into account the perspectives and experience of service providers and other "on the ground" practitioners. Value is placed on client feedback and reflection, and on the development of effective means of knowledge translation and transfer.

Quantitative data were collected via electronic surveys using Likert scales, as well as both closed and free text questions. Qualitative data were collected through semi-structured interviews with some open-ended questions. Member checking and peer review were used to validate the study.

Participants

A purposeful sampling strategy was adopted for this research investigation. This involved selecting information-rich mentorship relationships cases that provided the means for learning about issues and concerns that were central to the major area of inquiry of this investigation (Patton, 2002). Given that there were limited numbers of locations on which to draw sufficient numbers of specific mentorship relationships that included a cross-cultural context, the Business Immigrant Mentorship Program offered in New Brunswick, Canada was selected as the setting from which to identify potential participants for this study. The primary goal of this entrepreneurial mentorship program is to support business efforts by new immigrants in smaller cities with emerging immigrant populations.

Key Informant Interview Format

A semi-structured interview approach was used to carry out key informant interviews. This format involved the use of a broad-based interview guide that included a list of areas of inquiry used for each interview event. The interview template also included example probes intended to encourage participants in their exploration of important perspectives and themes during the interview sessions. Although there was an established line of inquiry for the interviews, questions and probes were embedded in a conversational interview approach with participants (Patton, 2002). The major areas of inquiry for the key informant interviews included:

- Sharing experiences related to mentorship interactions and activities

- Reflecting on the nature and quality of mentorship relationship
- Exploring lessons learned from participation in the mentorship relationship
- Investigating implications for enhancing the mentorship experiences for mentor and mentees interactions and relationships in the future

Procedure

Prior to the initiation of data collection activities, completion of the university's ethics review process was completed and standard research procedures were used.

Analysis of Data

With respect to the key informant data, qualitative methods were applied to transform data into meaningful findings. Hearing the actual testimonies of participants allowed access not only to descriptions and personal viewpoints, but also to insights regarding the meaning attached to participants' experiences (Merriam, 1988). Individual written summaries were merged to provide a unified data set. Analysis began at the point of data collection while taking time to memo, record and track analytical insights that emerged as interview data were gathered and analyzed.

Interviews were then organized and translated into findings by a careful review of interview transcripts, by identifying any significant patterns, and by constructing a framework for communicating what the data revealed (Yin, 2003). Detailed individual and summary protocols were completed for each interview.

Content analysis was used for identification of themes and findings. A process of inductive analysis provided the opportunity to identify themes important to participants, to discover any patterns that connect said themes, and create coded categories for the purpose of organization. Following this initial analysis effort, emergent research themes were organized into major theme categories.

Discussion and Findings

Attributable to conversations, the survey and interview data, five themes of significance emerged relevant to cross-cultural mentoring practices. Two forces were found to militate against the successful transfer of expertise and support within a cross-cultural mentoring relationship in which the mentee is a recent immigrant: language to a greater degree, and culture to a lesser degree. This is, of course, is on a case-by-case basis. English speaking immigrants, for example, would be an exception.

The study resulted in several practical lessons for navigating across cultures. The five themes, skills and/or competencies that influenced cross-cultural mentoring relationships emerging from this research are as follows:

1. **Blended Mentoring (Computer-Mediated-Communication [CMC]-Supplemental)**

Among participants, language was consistently cited as a challenge – often due to accent and not necessarily language ability. Almost all of the mentees had at a minimum a post-secondary degree, demonstrated linguistic

capacity, and they were well along in *English as an Additional Language* (EAL) training. Nevertheless, accents were cited as a challenge during face-to-face mentoring. For instance, in my conversations with one participant his English was quite fluent, and our discussions included lighthearted references to language differences. His mentor, however, had trouble with his accent and the relationship was stalling. Correspondingly, this participant conducted a personal SWOT analysis and emailed it to his mentor. The SWOT analysis was a way of not only introducing himself, but represented an effort to "get-down to business" and to circumvent oral language issues.

Mentees found that letters-on-the-page, or in this case email, offered the potential to overcome not only barriers of geography/distance and time but more importantly, barriers created due to accent, ultimately lessening apprehensions associated with accents and potentially, contributing to the personal development process. Cohorts within the study enhanced the quality of developmental interaction by employing computer-mediated communication (CMC). Email and CMC options that supplement face-to-face (FtF) relationships have the potential to minimize accent issues. Given the effectiveness of email as a communication instrument, the prevalence of this communication method, and participants' relative comfort levels, dyads used this tool frequently.

In sum, CMC allows for the development of interpersonal relationships and has had an important effect on the mentor's and mentee's ability to deepen the relationship. Cross-cultural mentoring training should draw from CMC

(Ensher, Heun, & Blanchard, 2003), intercultural communication (Osula, & Irvin, 2009), as well as e-mentoring literature/distance mentoring literature (Eby, McMannus, Simon, & Russell 2000; Scandura, 1998). Participants should be trained in the unique aspects of CMC and prepared for navigating challenges such as expectations, n-etiquette, miscommunication, and issues of privacy and confidentiality (Ensher, 2003; Shpigelman 2009, Weiss, & Reiter, 2009).

2. Sherlock Sleuthing (deduction abilities of the mentor)

Mentees state quite quickly that "they don't know what they don't know." In this study, mentees had high regard for mentors who were able to uncover or reveal "knowledge gaps," and to discover problems or recognize the need for reprioritization of business goals. A conversation with one mentee that was echoed by others uncovered that mentees would often cite one problem, but the issue at hand was often something else altogether.

Mentees, at times, only understood knowledge gaps after the fact. Such gaps were often legal, financial, or regulatory or in some other way very specific and focused. Many gaps were attributable to and further compounded by a lack of social integration or existing networks, and resulted from insufficient knowledge of the new business milieu, the economic and social environments, legislation and regulations, or the labour market (Brenner, 2010; Ley, 2003; Light, 1984; Rath & Kloosterman, 2000; Sharif, 2009).

3. Culture

Culture held unique and individual meaning for each participant. This theme can be divided into two subcategories. The first highlights the importance the mentees placed upon their mentor as a "cultural broker," "cultural interpreter," or "cultural guide."

Despite the variations and circumstantial differences, many immigrant entrepreneurs faced common challenges as they navigated through unfamiliar gaps in their host environment, including unwritten rules, conventions, norms and practices that were not readily accessible to newcomers.

In an effort to thrive, recent immigrants must learn how to interact effectively in a completely new environment where people think, feel and act differently, and often speak a different language. Without aiming to account for every detail, one might summarize that most lack invaluable contextual experience, and that connections and resources are often limited. Mentees leveraged mentors' knowledge during the customization process in order to both bridge cultural gaps and address challenges of a practical nature. Each felt, to varying degrees, that his/her mentors were vital resources offering the cross-culture transition support necessary for relocation success. In recognizing that they hold the position of cultural *insider,* mentors will be better able to offer support.

While there is an unwritten expectation that newcomers will make efforts to acculturate, there are also unwritten expectations. For effective

communication, mentors must make efforts to view and appreciate the world from the mentee's perspective(s). The cultural background of mentees influenced perception of and expectations for the mentoring relationship; accordingly, the need for mentor competence in navigating cultural differences due to differing national and/or cultural value systems should not be underestimated within mentoring relationships - for both members of the dyad.

Interview results indicated that cultural understanding as an aggregate was addressed in cross-cultural training for both mentees and mentors, but tools to *drill-down* to specific cultural and/or ethnic levels were lacking. Correspondingly, targeted cultural training or resources were identified as potentially helpful in guiding participants in their effort to understand the influence of specific cultures and ethnicities. Although there is little empirical evidence regarding the role of culture in mentoring (Chi-Ying, Bemark, & Talleyrand, 2007; Ensher, 1997), there are several models that could assist with understanding the dynamics that may be present during cross-cultural mentoring.

Both Tropenaars Hampden-Turner's seven dimensions of culture theory (Trompenaars, & Turner, 1993), and Hofstede's national cultural dimensions theory (2001) provide benchmarks for discussion of national cultures or value; each is a group level assessment and should not be viewed as a rigidly prescribed set of behaviours or characteristic. Not every single individual from even the most circumscribed or strict culture may display any or all of the

features commonly associated with it. Everyone is, after all, an individual, and individual differences do persist. More specifically, as the relationship evolves, mentors and mentees can move forward validating and invalidating cultural assumptions via verifications and validations. The importance of this should never be underestimated since communicational misunderstandings can potentially lead to serious consequences.

4. Networking

Immigrants choosing to move to new gateway communities require support in their efforts to develop co-ethnic ties and a new sense of community (Ramos, & Yoshida, 2011). To this end, mentees reported that mentors brought a dynamic web of resources, connections, and networks to "the table." Correspondingly, mentors have not only the potential to help to socialize a protégé to a community's norms, but also offer access to informal networks and power structures that are critical in the world of business. They are in a position to offer upward mobility to mentee newcomers. Mentees spoke to the importance of the connections mentors possessed and how generous most were in sharing their network of both business and personal contacts. However, to take advantage of introductions facilitated by the respective chambers mentee's must be able to network.

While mentees may say and sincerely believe that networking is essential to business growth and development preliminary research indicates that

mentors may have to validate and assumption hunt to ensure that mentees grasp what social norms and skills are required, and that they grasp the "soft skills" associated with networking in their new business milieu. For example, mentors may need to be prepared to find out how effective the mentee is at:

- framing his or her business and how refined the approach is;
- answering questions such as: "What do you do?", "Tell me about your business?", "What do you like most about the business you're in?", "What do you like least?", "Where are you from?", or "What is the perfect client for you?";
- fielding questions and describing key benefits of the business;
- speaking to sales objectives, or target demographic models, for example?; and
- program coordinators need to know if mentors are comfortable role-playing increasingly complex introduction scenarios with mentees?

Networking is a learned skill and the nuances vary greatly from country to country. To take advantage of the mentor's network and other introductions facilitated by the respective chamber organizations, mentees must be able to network. We all know that "Networkers" are not created equal; the more one has to offer, the more likely others will be interested in meeting and working with a mentee.

Data from the study provided evidence that, while mentees may say and sincerely believe that networking is essential to business development, preliminary research indicates that mentors may have to validate and "assumption hunt" to ensure that mentees grasp the social norms and skills that are required. Mentors need to be prepared to check whether or not the mentee is ready to "be networked," "can network others," and understands the follow-though required to move an introduction to an actual contact.

5. Mentor "as a sounding board"

At the individual level, mentees highlighted the importance of conversations that explored doubts, identified business possibilities, and revealed aspirations. Researchers St-Jean (2009) and Valéau (2006) have observed that all entrepreneurs experience periods of doubt during which they consider the possibility of abandoning their business aspirations. While this is mirrored here, in part, the stakes appear to be higher for immigrants.

At times mentees spoke of the implications of economic self-determination in an unknown environment and how it is inherently connected with even greater risks than for those born in the country. There was a sense from the mentees that it would be one thing to fail at a business in their country of origin, but an entirely different level of failure to be unsuccessful at a business in a new country. First of all, in their new context, there is no family to count on

for help. There is also the additional stress of potentially having to return home with a business loss hanging over them, culminating in a loss of face.

Conclusion

Mentoring is less and less a race-free or culture-free endeavour. In light of the ongoing move toward economic globalization, immigration trends and workforce diversity, this research has the potential to provide valuable information to not only cross-cultural mentoring for newcomer or immigrant entrepreneurs, but also for cross-cultural youth and faculty-student mentoring programs, as well as expatriate mentoring efforts.

A contribution of this research is the expansion of mentoring research into the cross-cultural/inter-cultural arena as well as the extrapolation of promising practices. Early interviews highlighting the unique characteristics of mentoring in cross-cultural contexts, including participants' conception of mentoring, expanding the two functions traditionally used in mentoring studies (career versus psychosocial) to include role-modeling; mentor as guide; the importance of cross-cultural transition support; career/business implications; and the dominance of psychosocial support. This paper began with the question of how immigrant mentees perceived the diverse meanings of cross-cultural mentoring or more specifically, what skills and/or competencies are beneficial to the mentor or mentee. The results of this study led to several recommendations for mentors, mentees and organizers to enhance cross-cultural mentoring efforts.

For instance, found within the five themes, there appear to be key qualities and practices that these study participants employed, including challenging assumptions, remaining open, increasing cultural awareness of self and others, coping with ambiguity, and using a multiplicity of communication styles, each of which would be important to include in mentorship training.

The literature scan has identified unique and sometimes competing perspectives relative to the term *cross-cultural mentoring*. It is possible that the mentoring profession may never agree upon a common or delineated use of the term, and the multi-disciplinary use of the term does little to provide clarity. For this reason, it is incumbent upon researchers to clearly outline who participants are, where the mentoring is taking place, and to what end.

However, this research should be treated as a limited first step into this type of analysis. Expatriates' self reports and retrospective sense-making may suffer from hindsight bias and/or attribution bias. A longitudinal study that includes mentors is necessary to examine relationship dynamics through different stages. Additional areas of future research are also suggested by lessons learned. Like most research on cross-cultural mentoring, this study was cross-sectional, and thus could not examine the mentoring process as it unfolded over time. While acknowledging the difficulties in conducting longitudinal research, it would be advised that studying the mentoring process as it develops over the course of the program would enhance the understanding of how mentoring influences effectiveness of individuals mentoring across

cultures. Such longitudinal research would enable scholars to examine not only the effects of the mentoring program but also how these mentoring relationships may change over time — from initial acceptance of the relationship to its formal conclusion. Longitudinal studies of the different types of support that respective mentors provide (e.g., focus on task *vs* entrepreneurial support *vs* psychological support), mentor/protégé frequency, intensity, and effectiveness of communication, and how mentor/protégé communications may affect the knowledge transfer process, would greatly enhance the research on cross-cultural mentoring.

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Chapter V: Corporate mentorship programing: Promising program practices for "fast-tracking" high potential employees

Process Evaluation Overview

This process evaluation involved the review of existing mentoring programs at XYZ Corporation (XYZ)[1] to examine the consistency of program implementation; identify implementation challenges, accomplishments and solutions; identify essential mentoring content and approaches; and investigate mentoring processes and their impacts. Such evaluation activities make it possible to identify the strengths and challenges that influence a program's success. This evaluation focused on the programs' written objectives, implementation activities and outcomes. The review utilized records from existing program processes, insights gathered through meetings with staff members and data collected from program participants to synthesize information about program participants to synthesize information about program implementation and to evaluate process objectives. The evaluation was carried out over a 12-month period.

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[1] To respect client confidentiality, references to the corporate client have been redacted

A key goal of this analysis was to explore process fidelity by evaluating whether the *Mentorship Program for Business Professionals* and the *Fast-Trak Mentoring Program* were implemented as stated in their original written objectives, and whether the programs met identified business need(s). More importantly, this evaluation was intended not only to determine which objectives were and were not met, but also to elicit feedback related to program design, structure and implementation. Finally, program documentation was reviewed to assess the thoroughness with which materials prepare individuals for participation in the mentorship programs, and to examine any gaps in documentation related to the implementation and efficient functioning of each program.

The *Mentorship Program for Business Professionals* is designed to serve employees pursuing masters of business administration degrees. The *Fast-Trak Track Program* is a "fast-track" program for high-potential new employees. Participants are generally recent university graduates who have been recruited to the program; others are individuals at relatively early stages in their careers who have been identified as having high potential within the company.

A primary goal of the research was to provide information that would assist XYZ in blending the various mentoring efforts into a cohesive program that could provide a foundational roadmap for XYZ moving forward in subsequent mentoring initiatives. In this regard, a logic model was created to outline key stakeholders, goals, project actions, outputs and outcomes of the

mentorship program. Further, the process evaluation was meant to highlight areas for improvement related to clarity, content and approach to information sharing for mentorship program participants.

This process evaluation represented the examination and evaluation of mentoring activities at a very early point in XYZ's attempts to implement mentoring programs that met the needs of both the corporation and its employees. The process evaluation included document reviews, interviews conducted with program personnel, and mentors and protégés to elicit their perspectives on the mentoring program. The final process evaluation component examined data gathered in the course of the project's analysis and reporting to offer a formative evaluation.

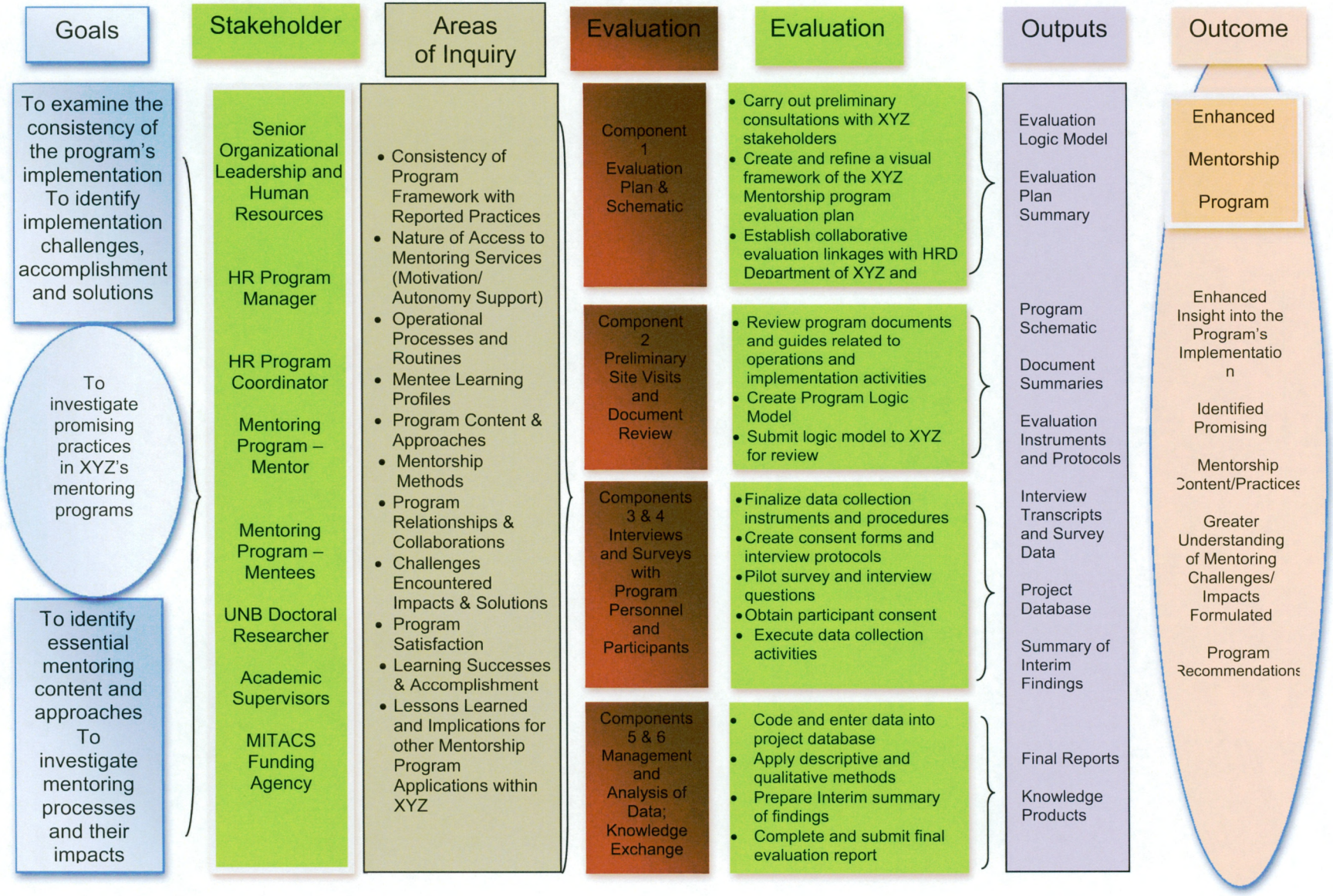
The purpose and outcomes of this process include:

- Supporting the re-working of XYZ's mentoring guides
- Identifying promising program practices to support the operationalization of XYZ's mentoring programs
- Refining program assessment and evaluation questions
- Exploring mentor/mentee participant contributions

Overwhelmingly, mentor/mentee participants expressed strong support for XYZ's efforts to incorporate mentoring into the company's educational and professional development strategies, finding the effort both laudable and proactive. Participants were eager to contribute to strengthening the program by providing input regarding a range of key issues. This evaluation offers a

summary of participants' perspectives related to program entry, delivery and content; relationships and interactions; and outcomes and impact; as well as participants' reflections and recommendations.

Table 1 Evaluation Logic Model for Mentorship Program Review Methodology: Process Evaluation; Descriptive Methods; Participatory and Narrative Approach; Appreciative Inquiry



Program Review Activities

Work on the process evaluation involved a combination of desk research, survey development, and the creation of interview questions and protocols. Evaluation activities were organized in three phases:

Phase 1: Preparatory Tasks

An initial planning meeting outlined various preparatory tasks including initial desk research, discussions with the academic supervisory team, preparation of research tools and finalization of the evaluation logic model and plan.

Phase 2: Document Review

Documents related to the delivery of XYZ mentoring programs were reviewed, including program descriptions, communication materials, personnel and program policies, process forms, instructional and participant materials, and program presentation documents. During Phase 2, a comprehensive document review was submitted for review to XYZ officials.

Phase 3: Data Collection

Phase 3 research involved the continued analysis of XYZ documents and other information, finalization of surveys in conjunction with XYZ officials, and the drafting of an interview program. Interviews were carried out with program

participants and administrators regarding key program processes related to recruitment, training, mentoring relationships, knowledge transfer, program administration and participant follow-up.

XYZ supplied a list of 22 potential participants, some of whom had completed programs and others who were current participants. A total of 16 employees participated in all or part of the process. Overall, the response rate of 70% among potential participants demonstrates the high interest level among employees in contributing to the evaluation. A demographic breakdown of participants is provided below.

Table 2 Demographic Breakdown of Participants

Target Groups	Number of Names Provided	Number of Participants	Mentors	Mentees
Fast-Trak Track	6	5	0	5
Mentorship Program for Business Professionals, MBA	15	9	3	6
Mentorship Program for Business Professionals, Business Certificate	1	1	0	1
Program Coordinator, Mentorship Program for Business Professionals, MBA	1	1	n/a	n/a

Analysis and Reporting

Interview data were recorded and merged across common areas of inquiry for the various participant groups. Content analysis was subsequently applied to identify common themes arising from the data. Similarly, written observations emerging from the review of documents were also organized in conjunction with the key interview themes to support the completion of the full project review.

The final project report provides an overview of the key findings and themes of the program review based on the outcomes of the various data collection activities. Descriptive paragraphs and tables have been used in the presentation of data and key findings. The report is structured to include:

- Process Evaluation Findings
    - Review of XYZ Mentoring Documents, Findings and Recommendations
    - Interview Outcomes
    - Survey Outcomes
    - Summary Service Gaps as Identified by Participants
- Summary Program Reflections and Recommendations (with self-assessment tools)
    - Program Philosophy
    - Organizational Support
    - Networking
    - Program Evaluability
    - Selecting Program Mentors
    - Program Coordinator
    - Best Practices in Mentorship Program Administration
        - Matching
        - Difference in Level of Seniority
        - Dyad Breakdown

        - Accountability and Ongoing Supervision
        - Mentor Recognition
    - Training
        - Pre-Service Training
        - Ongoing Training
    - Mentor/Mentee Meetings
    - Match Closure and Structured Exit Interviews

In addition, the Appendices of the report include survey questionnaires used in data collection activities.

Process Evaluation Findings

Introduction

The process evaluation was undertaken to provide analyses that could inform the design of future XYZ mentoring programs. The assumption of this evaluation was that the document review, interviews and surveys would provide an assessment of the overall program direction, and help identify information gaps that would serve to deepen and extend future program analysis activities.

Data for this review component were gathered through the execution of interviews with mentor/mentee participants, members of the Human Resource Division, and the review of program documents and materials. In collaboration with the XYZ Toronto and Montreal Human Resource offices, 22 potential mentees and mentors were identified. Thirteen mentees consented to participate

in this data collection effort. Eleven were subsequently interviewed in person, one was interviewed by telephone and one was unavailable. Three mentors agreed to participate and were subsequently interviewed. Areas of inquiry elicited these participants' perspectives on program intent and purpose, helpfulness, and service gaps and recommendations.

The following sections provide a summary of key findings related to the document review and analysis, as well as participant perspectives regarding the Mentorship Program for Business Professionals and mentoring activities associated with the Fast-Trak Track Program, as reported through interviews and survey responses.

Document Review

Introduction

The purpose of the document review was to contribute to the comprehensive review of XYZ's formal mentoring activities. Five mentoring programs were examined. The report related to this portion of the process evaluation was submitted to XYZ at the half-way point of the evaluation process for comment and input. The following section includes highlights of the review of documents related to XYZ's efforts to institute mentoring programs within various sub-companies. The goal of the document review was to look at usability, accuracy of content, accessibility of format, and quality and value of

the documentation. Thus, the evaluation assessed whether users were acquiring accurate and adequate information about the existing mentoring initiative(s).

The review included a preliminary stock-taking of how the Mentorship Program for Business Professionals was envisaged within XYZ's mentoring activities, and outlined patterns and trends for the integration of adult learning methodologies within this effort.

Method

The intent of the document review was to examine key operational and relationship processes as outlined in existing documents. This approach examined the documents in light of current research and identified promising practices in the field of mentoring. As such, a predominantly deductive framework approach was used to categorize and evaluate the relevant documents. The review was conducted using a customized template that extracted relevant sections from the documents and organized them according to indicators and evaluation questions. This approach examined the documents in light of current research and identified promising practices in the field of mentoring. The quality and value of process documents were also evaluated.

An initial document inventory was completed using existing and accessible documents relevant to the planning and implementation of the XYZ mentoring initiatives. Data sources for the development of the initial inventory included:

- **Background and program documentation**, including foundation documents for the program and related policies.
- **Corporate/operational documents**, including documents related to the delivery and management of the program, operational guidelines, manuals, handbooks and administrative reports.
- **Audits, reviews, assessments and evaluations**, including any previous evaluations, audits, surveys and research studies.

The document review analyzed available company documentation related to the development, implementation and evaluation of XYZ mentoring programs, including:

1. Strategic Mentoring at XYZ Corporation: Mentoring for Leadership development
2. Program Overview: XYZ Employee Mentoring Program
3. Mentorship Program for Business Professionals for Mentors
4. Mentorship Program for Business Professionals for Mentees
5. PowerPoint Presentation: Mentorship Program for Business Professionals
6. Survey: Business Mentoring Program
7. Strategic Mentoring Program - XYZ Corporation – Protégé Guide

Documents collected included two items that were in draft format – the Feedback Survey and Communicating Matches to Program Participants. Given

the developmental stage of these documents, they were not included in this review.

The key findings for this portion of the document review are presented below. Recommendations and adjustments are based on documented promising practices (Kram & Ragins, 2007), including:

- *Program elements*: Role of the program coordinator; mentorship program activities; operational issues; recruitment; placement and matching; assessment and orientation of the mentors and mentees; training of the mentors and mentees; routine monitoring of the dyad
- *Relationship characteristics*: Triangulation of the dyad with the program manager; policies related to structuring the relationship
- *Relationship scope*: Role definition and clarification, defining expectations; life cycle of the relationship; relationship management including relationship breakdown
- *Protégé outcomes*: Learning goals; professional development; measuring progress
- *Mentor growth and development*: Mentors' personal growth and skill development
- *Organizational outcomes*

Document content was reviewed, highlighting the quality, accuracy and thoroughness of each document. The purpose of rating the quality of content was to show to what degree the material was suitable and inclusive of a broad

spectrum of quality attributes. There are three major benefits to this method of documentation evaluation (Schiesser, 2001):

- The method provided a snapshot of the quality of existing documentation. Changes made could result in new and revised ratings that could be compared against earlier versions.
- Criteria for the quality of documentation could be modified to reflect changes in priority, strategy, or direction.
- Standardized measures allowed for comparisons across different types of processes.

Summary of Findings

The findings of this review were meant to be learner oriented and user centered. This process consisted of a review of documents related to XYZ's efforts to institute mentoring programs both at the head office and within various sub-companies in efforts to:

- Buttress succession planning
- Cultivate the next layer or generation of XYZ leaders
- Manage skills training and/or certification
- Orient new hires
- Increase retention (unstated/implicit)
- Cultivate networking (unstated/implicit)

In undertaking this review of published documents and guidelines, it was noted that XYZ's mentoring initiatives met the criteria of *formal mentoring programs*, which are characterized by the following criteria:

- Include training for participants
- Tie the mentoring program to business goals with measurable results
- Conduct periodic evaluations (Ragins, Cotton, & Miller, 2000)

In short, formal mentoring programs are organized, managed and monitored by someone outside the mentor-mentee dyad.

With respect to the overall content of mentoring program materials, it was recommended that documentation be expanded and enhanced to provide additional practical resources that include process tools, strategies, and techniques for understanding and operationalizing the mentoring process. Regarding the intent and purpose of the program, revised material could frame mentoring within XYZ's constellation of learning practices conveying, in sum, that XYZ teams learns powerfully and collectively and is continually transforming itself to better acquire, manage and use knowledge for corporate success.

The following indicates recommendations arising from the document review, organized according to emergent themes. Detailed discussion, application suggestions, and rationale regarding these recommendations are included in the document review (Appendix C).

Program Preparation and Ongoing Training

Research related to the development of pre-service training for mentors and mentees specifies that training should include: a) the clarification of program objectives; b) discussion of the program requirements and procedures; c) instruction on how to set expectations and boundaries of the relationship; d) discussion on how to handle a variety of situations; and e) concepts and strategies to help build the relationship between mentors and mentees. Research on workplace mentoring confirms that the quality of training correlates to perceptions regarding the effectiveness of the program (Finkelstein & Poteet, 2007).

Mentors

Encouraging employees to reflect upon their own sources of motivation before engaging in the mentoring relationship can affect the quality of the interaction within it. This step is important for all mentors, but especially important for new mentors who may assume that having subject expertise and experience is adequate preparation for being a mentor. Correspondingly, mentors who have an understanding of *why* they are participating are more likely to work at sustaining the relationship, facilitating the learning relationship effectively, and ultimately, growing from it personally. Through such discussion, mentors may gain insights into potential learning objectives and outcomes for

themselves, thus providing mentors with the opportunity to develop a "mentoring" style of management.

Recommendations

1. Mentors should be given the opportunity during the orientation session to discuss their experiences with mentoring.
2. Mentors should be prompted to reflect on their skill levels regarding coaching, communicating, goal setting, managing conflict, and providing and receiving feedback.
3. The benefits accrued by mentors should be highlighted by the company.
4. The elements of adult learning or a learner-centred paradigm should be outlined for mentors.
5. The mentor's business contacts and networks are important to the mentee; mentors should consider how they could assist mentees' efforts to expand their networks within the company.

Mentees

As with mentors, preparation is an integral step for mentees. Self-appraisal of personal development, an understanding of essential areas for improvement, and an awareness of personal approaches to learning can be valuable exercises for mentees.

Recommendations

1. A mentee skill inventory may be useful and could include self-assessment in the following areas:
    a. Giving and receiving feedback
    b. Self-directed learning
    c. Building relationships
    d. Communication
    e. Goal setting
    f. Effective listening
    g. Follow-through
    h. Reflection
    i. Initiative
    j. Valuing differences
2. Program documentation could address issues such as asking for feedback, receiving feedback, accepting feedback, acting on feedback, and providing feedback.
3. Program documents could include guidelines for mentees related to moving beyond listening in order to seek clarification of their understanding and accuracy of their assumptions; as well as to manage the mass of information and new knowledge emerging from the mentoring experience

Matching Criteria

Research outcomes confirm that giving participants some level of input into the match increases the likelihood that mentors and protégés will be compatible, and that individuals will be linked in a relationship that meets their unique developmental needs. Correspondingly, when employees are empowered to make decisions, they become self-determined; in other words, psychological ownership is created (Wanberg, Welsh, & Hezlett, 2003).

Recommendations

It is recommended that matching criteria for the dyad be expanded to include:

1. *Perceived similarity*. Perceptions of dyad similarity have been found to speed the development of rapport and trust and to reduce uncertainty for both parties. To speed rapport, similarities such as academic or professional background, interests, or even family circumstances could be considered. Other factors related to similarity include:
    a. Mentors' fund of relevant knowledge, experience, social capital, and psychosocial and communication ability
    b. Mentees' fund of prerequisite knowledge and experience, communication ability, and learning capabilities (Bozeman & Feeney, 2008)

2. *Recognition of ability*. On the part of the protégé, participation in mentorship can provide a visibility boost. On the part of the mentor, framing mentees as employees with high potential and ability rather than as those in need of help may ease mentor recruitment challenges. Mentors are encouraged by a match when they know mentees have been selected on the basis of their talent and potential, eagerness to learn and willingness to participate in mentoring (Allen, Poteet, & Russell, 2000). Correspondingly, individuals who are considering signing up as mentors are more likely to be drawn to a program populated by individuals whom they perceive as "winners" and as "coachable" with high achievement, motivation, and a strong learning orientation (Allen, et al., 2000).
3. *Learning Style*. Some employees have learning disabilities, and all have preferred learning styles. Matching the predominant learning style of both members of the dyad (e.g., activist, reflector, theorist or pragmatist) is worthy of consideration when matching, and will influence the dynamics of the relationship (Trautman, 2007). Existing learning style instruments (e.g., *Canfield's Learning Style Inventory*) may be helpful in identifying commonalities within proposed mentoring dyads.

Relationship Management

A discussion of relationship management between the mentor and mentee is an opportunity to define lines of authority, clarify overlapping roles and

responsibilities, and limit the potential for role confusion. Pertinent questions such as *What is my role as a mentor/mentee*? or *What are my responsibilities as a mentor/mentee*? will permit the dyad to come to a mutually agreed upon working concept of the mentoring relationship.

Recommendations

1. The topic of confidentiality could be further expanded in program documentation. Individuals have differing expectations of what confidentially means, and varying approaches to safeguarding information. The mentor and mentee must check his/her own assumptions against each other if they are to share mutual accountability for the mentoring partnership. There must be consensus and clarity about what confidentiality means within the relationship to promote open, authentic, free-flowing and candid communication.
2. The development of guidelines for structuring a frank discussion about the limits and boundaries of the mentoring relationship is recommended. Such conversations help ensure that the focus of the relationship remains firmly on learning. It is important for the dyadic pair to communicate what they are willing and unwilling to do; in other words, to establish *relationship ground rules*. Access and contact protocols should also be negotiated at this time in an effort to identify communication preferences, and to define boundaries within the relationship.

3. As challenges and miscommunications are to be expected, it is recommended that clearer instructions be included regarding relationship breakdown and the role of the coordinator. Assigning relationship closure as a point of discussion within the dyad can help participants evaluate learning outcomes and identify how to maximize and build on learning.

Management of Regular Meetings

Regular information sharing is fundamental to a successful mentoring relationship. There are many existing models from which mentors can draw in order to get the most out of meetings.

Recommendations

1. It is recommended that program documentation include guidelines and prompts to enhance meeting efficacy. Such guidelines may include prompts to:
    a. Define the purpose of the meeting
    b. Explain the relationship of the goal to the job/mentee's learning goals
    c. Outline the main points
    d. Note the jargon
    e. Identify practice opportunities
    f. Provide additional resources
    g. Provide context

h. Connect the purpose of the meeting and its usefulness/applicability to the mentee's work or learning objectives (Trautman, 2007)

2. Mentors could be encouraged to raise the issue of meeting efficacy for regular review and discussion.
3. Mentors could be supported in efforts to track the mechanics of the relationship. Questions about the mentee and the mechanics of the relationship may include[2]:
    a. What is my most difficult mentoring challenge so far?[1]
    b. What is working well?
    c. What could be working better?
    d. What new learning has affected me?
4. Mentors could be encouraged to periodically assess their relationships with mentees. Example areas for examination may include:
    a. What is the quality of our interactions?
    b. What is the learning process?
    c. What might I/we do to make the process work better?
    d. What is my greatest success thus far?

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[2] Exiting research clearly identifies not only the benefits but also the challenges associated with mentoring correspondingly; conflict-free relationships are rare; both parties should be dually prepared of the eventuality of challenges within the relationship.

5. At the conclusion of each meeting, mentors could be encouraged to check "next steps." This can be accomplished by asking any of the following questions:
    a. Before you leave, could you discuss your next steps?
    b. What are your action items from this meeting?

Personal Development Plan

Mentoring is solidly embedded in learning. A personal development plan is instrumental in ensuring that the relationship is focused on meeting mentees' learning goals and objectives, and providing a structure for systemizing learning. The creation of an action plan ensures, on the part of the mentee, that a high degree of responsibility is taken not only for learning, but also for the co-creation of a systematic procedure for evaluating learning outcomes. Together, the mentor and mentee appraise what collection of evidence needs to be in place to determine whether desired changes took place.

Recommendations

The creation of a personal development plan should be required of mentees; not only to articulate their vision and goals, but also to analyze what gaps exist between their vision and their current competency. During the process of reviewing the plan, the learning styles/preferences of both the mentor and mentee could be discussed. The Personal Development Plan should address:

- Competencies
- Learning goals
- Objectives
- Learning tasks
- Potential resources
- Target dates
- Accountability assurances
- Responsibilities
- Success criteria and measures
- Protocols for addressing stumbling blocks

Knowledge Transfer

Program documentation should remind mentors that their role is to engage in a process of mutual inquiry with the mentee, rather than in a relationship that merely transmits knowledge and measures conformity. Mentees may need guidance regarding coping with multiple points of view and dealing with uncertainties.

Recommendations

1. It is recommended that program documentation remind mentors that their role is to engage in a process of mutual inquiry with the mentee, rather than in a relationship that merely transmits knowledge and measures conformity.

2. Program guidelines could encourage mentors to check frequently with mentees during knowledge transfer activities in order to protect the mentor from having to revisit the same information, and potentially from having to repair problems due to ineffective knowledge transfer processes.
3. Guidelines could suggest that having the mentor summarize the meeting or learning points, in order to help the mentee solidify what transpired in a session, and to allow for the mentor to check assumptions.

Role of Status Reports, Evaluation and Program Review

Status reports and end of program evaluations are opportunities for ongoing professional development. As such, end-of-program evaluations should focus on future learning interests – on how participants envision expanding their current skill sets and competencies to continue their development journey. Both mentors and mentees could be required to fill out status reports and exit evaluations, providing opportunities for both parties to learn from a retrospective examination of the mentorship experience.

Recommendations

1. Status reports and evaluation processes could be framed as launching pads to highlight and extend personal development.
2. Status reports and end-of-program evaluations may be used not only at rigidly scheduled times, but also if the mentoring arrangement is pre-

empted. Such documentation will provide a point of transition for what is to follow (full closure of the relationship; the transition of roles to friend, manager, or colleague; or the continuation of the mentorship relationship). These forms could also include a re-evaluation of the goal(s) of the program.

Participant Interviews

Introduction

The purpose of this data collection effort was to investigate individual perspectives regarding the execution of mentoring efforts at XYZ Corporation, as well as to analyse themes related to participant experiences within the mentoring process. Areas of inquiry focused on obtaining feedback related to participant readiness, mentor techniques and/or practices, program elements, professional development, and satisfaction levels related to mentoring initiatives and networking opportunities.

Method

The complexity of evaluating business initiatives often requires that research methods capture the rich, nuanced and varied personal feedback of individual cases or small-scale analyses. Correspondingly, this study utilized *self-reporting*, employing both a retrospective survey questionnaire and one-on-one interviews. Interviews further explained and enhanced the quantitative findings of the survey. Allen & Eby's (2003) comprehensive review of mentoring

research emphasizes the importance of context, noting that qualitative research on mentoring has substantial utility in understanding the potential of mentoring. This approach provides a forum enabling participants to give voice to what matters to them and why.

Specific themes investigated included

- Meeting functionality, logistics and general details
- Activities typical to a meeting
- Personal/developmental benefits
- Knowledge transfer and personal learning
- Mentee/mentor perceptions
- Quality of mentorship programs

Summary of Findings

Overwhelmingly, participants during interviews expressed strong support for XYZ's efforts to incorporate mentoring into the company's educational and professional development strategies, and were eager to contribute to strengthening the program by providing input regarding a range of key issues. This section of the report offers a summary of participants' perspectives on program strengths, as well as suggestions for improving specific program elements. Noted impacts, benefits and suggestions are organized according to theme, with selected comments and descriptive analyses providing a synthesis of participant responses and perceptions.

Program Documentation, Purpose and Orientation

Some participants noted that the program might benefit from additional print collateral, including enhanced or additional training and reference materials. Mentors from the Mentorship Program for Business Professionals for example, suggested the provision of form letters or descriptive materials to support their efforts in explaining the program to supervisors who have MBA students in their departments. Consistent messaging and the standardization of both supervisor responsibilities and mentees' networking experiences were seen as potentially beneficial for mentors in their efforts to achieve program replication and common approaches to mentee experiences.

> "We need to support work-term managers. Talk to them about goal setting for participants, about a communication process, and about their role in helping us develop future leaders. We need to do a better job of this." (Mentorship Program for Business Professionals Mentor)

Mentees in the Fast-Trak Track program suggested that existing programs could be more purposefully structured in order to provide the essential components of leadership development support. Further, participants suggested that the program mission, vision, goals, and activities be more clearly operationalized, and their progress benchmarked. There was confusion among some participants regarding how to progress through the program.

"I'd like the Fast-Trak Track Program to give us better information on how our careers are going and where they need to go to get us to where we want to be. I'd like more 'track' in 'Fast-Trak Track'." (Fast-Trak Mentee)

Mentor Recruitment and Matching

Participants noted that they were unaware of specific guidelines and practices related to mentor recruitment, or of the qualities being sought by the company in perspective mentors. Some suggested a nomination process, whereby senior executives within the company could identify individuals with extensive experience and who embody the corporate culture and vision.

It was also noted that the process of recruiting new mentors might benefit from more extensive documentation and program descriptions, so that potential program participants would have a clear understanding of company expectations related to their mentoring activities and outcomes.

"There have been hesitations from those who we've asked to be mentors. <The reasons range> from 'I don't even know what that involves,' to 'I don't know what's expected of me.' Nobody wants to fail; no one wants to be a bad mentor." (Mentorship Program for Business Professionals Mentor)

Regarding mentor/mentee matching, participants felt that the Performance Index (PI) could be used to align dyads in terms of personality types and complementary work and learning styles. Some participants were unsure of the existence of formal matching processes, or of corporate direction regarding the desired skill sets to be addressed and nurtured through mentoring relationships.

> "I think that the one thing that we haven't necessarily done very well is the matching, the aligning of the mentees and the mentors. I think that there are some things that we could have done a little differently. We could utilize the PI's, for example." (Mentorship Program for Business Professionals Mentor)

Some Fast-Trak mentees who were paired with mentors in the same department suggested that there may be value in matching individuals from different departments:

> "I see my mentor every day, and so our meetings are more work oriented – what we're going to get done today – and not about my career. When we meet it's not about my progress, how I'm developing, or my future. It's about day-to-day tasks." (Fast-Trak Mentee)

Fast-Trak Recruitment and Programing

While Mentorship Program for Business Professionals Mentees undertake mentorship as a required component of their programs, Fast-Trak mentees participate based on initial company recruitment efforts, or the identification of promising potential among new employees. While all mentees felt very strongly that the idea of the Fast-Trak Program was laudable, they reported mentorship and networking experiences that varied greatly. Components or characteristics of the program that were highlighted for potential improvement by mentees included moving beyond the program as a recruitment tool, and operationalizing the company's goals and desired results related to Fast-Trak outcomes:

> "The program should help enhance what the individual can get from the organization, and what the organization can get from the individual." (Fast-Trak Mentee)

Further, most participants noted the potential benefits to both current and future mentees related to enhanced program structure, consistency and accountability.

Regarding perceptions of Fast-Trak competencies, participants were unsure of the nature of the professional skills or milestones envisioned by the company as integral to success in the program:

"What are the Fast-Trak competencies; <how do we> know we're advancing along the Fast-Trak Path? I want to know what training is available and what I need to have or do in order to be viewed as a potential future leader for XYZ." (Fast-Trak Mentee)

While mentees were clearly invested in the program and committed to the mentoring process, concern was noted regarding Fast-Trak's promotion as "an accelerated path for developing <careers>," especially within the company's employee recruitment efforts. One mentee indicated that after joining the company, "I heard about it once or twice but there has been no follow up – I've never been contacted about it... I had high hopes, <but> I had kind of just forgotten about it."

Mentor/Mentee Training

Mentors voice interest in mentor training suggesting:

"A mentor guidebook would be helpful. I've been provided with no formal mentoring guide or training." (Mentorship Program for Business Professionals Mentor)

Mentors were clearly very committed to the process and invested the programs growth and potential:

> In a mentoring session, I talk a lot, I do story telling, but is there something else that I could be doing? I'd really like some tools." (Mentorship Program for Business Professionals Mentor)

Some were concerned with whether or not they were asking the right questions of their mentees.

> "I haven't had extensive conversations about my mentee's expectations... but I also haven't asked the question. So it could have been the case where they had expectations that I wasn't meeting and they never told me. I guess I should ask..." (Mentorship Program for Business Professionals Mentor)

Mentors indicated that the program might benefit from additional training for both parties of the dyad. Both formal and informal training opportunities were regarded as potentially beneficial components to be considered, as were organized sessions allowing mentors to meet and discuss their approaches, challenges and successes.

> "A chance for even just the mentors together to have conversations about what we should and shouldn't be doing, or conversations about what we noticed that has been working and what hasn't been working would be helpful. We've talked

about doing this but we've just never done it." (Mentorship Program for Business Professionals Mentor)

Further, some indicated that increasing the communication between the Toronto and Montreal programs might be beneficial in enhancing program consistency, and benefiting from lessons learned in the respective programs.

"A mentoring tool kit would be fabulous." (Mentorship Program for Business Professionals Mentor)

Scheduling of Meetings

Regular meetings were deemed by participants as integral to successful mentoring experiences. It was suggested that, upon matching of dyads, the immediate scheduling of appointments for the first few meetings might ensure an effective start to mentoring relationships. Where initial meetings were not immediately scheduled, participants felt that meaningful relationships were less apt to develop:

A month can go by with no meeting and it can just fizzle. That initial meeting is so important." (Fast-Trak Mentee)

Mentees advocated for the establishment of firm meeting dates, established by program coordinators or mentors themselves:

> "It is pretty intimidating to try and schedule a <first> meeting with our mentors. It's hard to approach them because they are so high up in the organization." (Fast-Trak Mentee)

Mentee participants in both programs acknowledged the workplace pressure placed upon mentors, and were concerned about adding additional stressors.

> "Mentors are pretty busy people, so it's easy to feel that you're wasting their time. You kind of feel that maybe this [problem or issue] is stupid and you don't want to take up their time; they have so much going on. I find that having scheduled meetings helps in this regard." (Fast-Trak Mentee)

It was noted that some mentors took a more informal approach, preferring not to schedule meetings, but to invite mentees to contact them as needed. In these cases, mentees expressed hesitation in making contact:

> "My perspective is that if I didn't have <a serious issue> going on, I'd feel guilty for taking an hour and perhaps wasting my mentor's time. They're pretty busy and have a lot going on, so I wouldn't <take the initiative to> book a mentoring session." (Mentorship Program for Business Professionals Mentee)

Similarly, while mentors expressed commitment to the practice of mentoring, they also indicated feeling time pressures:

> "I enjoy mentoring, although it's challenging with all of the other demands and responsibilities on me. It's an add-on to my other responsibilities. It's hard for me to find the time."(Mentorship Program for Business Professionals Mentor)

Corporate Orientation

Participants noted the role of mentors in the provision of orientation to the company's culture and processes.

> "Mentors really help set the <corporate> expectations – how to survive and how to thrive at XYZ. It's the background knowledge....that has been key to helping me really know what's going on. That knowledge is not captured anywhere – it's informal knowledge." (Mentorship Program for Business Professionals Mentee)

Many mentees indicated that they were endeavouring to navigate, for the first time, a business environment and adapt to participating in corporate culture in the "real world". Specific note was made of mentors who carefully planned orientation processes for these new employees:

> "He mapped it out for me, including the areas he wanted me to specifically touch on because of the operational track that I was on. He explained what he

wanted me to pay particular attention to in each department, because I would eventually be working with or for these people." (Fast-Trak Mentee)

Further, participants noted the value of learning "who does what", and how procedures played out within the company.

"It's a really different culture here, and the open-door policy really contributes to that. It comes right down from the top. ...As soon as you walk in <they> make you feel right at home. This has obviously trickled down from the top." (Fast-Trak Mentee)

Program Relationships and Interactions

"The biggest thing this program has given me is confidence and a comfort level within the organization. To know that there is someone at the executive level that has your back and is willing to answer questions; this type of connection is huge. It's helped me hold my head higher; I have more confidence and because of this I am more social, more involved in the organization. This is one of the biggest changes I've noticed because of the program, the comfort level I feel, [the program] makes you feel at home right away." (Fast-Trak Mentee)

Comments consistently confirmed that relationships between mentors and mentees were integral to their success in the program, and to their sense of support within the company. Many mentees remarked on the openness, warmth and non-judgmental nature of their mentors. The development of positive relationships at the outset of the program was viewed as contributing to decreasing initial program apprehension or anxiety. Many mentees emphasized how pleased they were to be immediately afforded "a surprising level of respect" by such "high-level" people. This sense of mutual respect was indicated as instrumental in easing transitions into mentoring relationships.

> "How he interacted with me as a new employee....I seemed to have his respect immediately and it went a long way. He didn't treat me as the 'unknown generation'." (Fast-Trak Mentee)

While most participants noted the value of interactions during formal mentoring sessions, some spoke of "lean meetings" when there were "no problems to solve." Mentees who characterized mentoring conversations as "problem driven" described situations where, in the absence of obvious challenges or problems, discussion would falter or meetings were cancelled. As such, participants spoke of their desire to move beyond a problem-driven mentoring approach to one that was focused on cultivating leaders, and that provided support tools such as conversation starters, the mentor's biography, a

summary of XYZ's leadership criteria, and a catalogue of professional development or learning opportunities designated as important to XYZ.

> "Formal structure: I think we need to move past the ad-hoc development of the program and get more structure." (Mentorship Program for Business Professionals Mentor)

Mentees characterized the benefits related to open lines of communication as contributing both to their comfort level with mentors and to increased ease of interaction with other executives within the company:

> "Mentoring opens up lines of communication in the sense that once I became comfortable with my mentor, I felt comfortable approaching other people in similar positions. I now take on that ownership and responsibility."
> (Mentorship Program for Business Professionals Mentee)

Mentees valued interactions whereby mentors shared their personal histories and experiences. Sharing stories of both challenge and success were highlighted as valuable "gifts" from mentor to mentee, allowing protégées to learn from past experiences, and build upon the strategies outlined by mentors. Through these discussions, participants also indicated that relationships were solidified and enhanced through the deeper understanding of each other's experiences and histories, leading to more effective mentoring activities.

"My mentor told me about the different departments he was in; he shared the different hardships he had, and how his career mapped out. He told me how he got to where he is today, and what areas he has touched upon in his career so far. Mentors can prevent history from repeating itself when they share their stories." (Mentorship Program for Business Professionals Mentee)

Such openness was deemed beneficial by mentees in gaining an understanding and appreciation of potential career directions, choices and goal-setting; as well as in the development of effective problem-solving strategies. For those dyads where such interactions were not the norm, mentees indicated their belief that this approach to mentorship would be beneficial to their own development:

"The way that I envisioned a mentor interacting with a mentee was giving practical information or suggestions for the first year. For example, *I see you're having problems in this area*; *I've had these problems too. When I was in a similar situation I..., or This is how I solved similar problems...*" (Fast –Trak Mentee)

Inter-Generational Insights

Mentors indicated that working with mentees enhanced their understanding and recognition of the goals, dreams and career plans of younger employees, noting substantial differences between the perspectives of older,

established employees and the new generation of young professionals. One mentor noted that:

> "Mentoring has probably changed my management approach," (Mentorship Program for Business Professionals Mentor)

Mentor responses indicated that, for example, there appeared to be a higher expectation of fast advancement than previously recognized. This realization led to an acknowledgement of the need to adapt (where possible) work assignments to be more challenging.

> "One thing participating in this program has done for me is help me recognize that what younger people want out of their careers is different than what I wanted, and what I thought [this generation of] people would want. I see that if we want to attract the best and the brightest we have to adapt. This <millennium cohort> is tough – the difference between what I saw when I was coming up through the ranks and what I see <now> is quite startling." (Mentorship Program for Business Professionals Mentor)

Mentors characterized the benefits of the program in terms of their own learning as an opportunity to have "fresh eyes" and perspectives, and to stay abreast of new approaches and ideologies represented by their mentees and their respective educational backgrounds. Other impacts indicated by mentors

included the recognition of the need to adapt management styles or perceptions in response to the realities of working with employees from another generation or cultural reality; and to develop enhanced respect for young employees' prioritization of conditions that promote a work-life balance. These opportunities for "bridging the generation gap" were seen as essential in enhancing reciprocal understanding and opportunities for inter-generational collaboration.

Emotional Support

> "I wish I had had a mentor, my personal feeling is that it's a really good thing. I never had anyone [mentoring] me, you found out the hard way...."
> (Mentorship Program for Business Professionals Mentor)

Mentees indicated the value of trust in their relationships with mentors, and their pride in the resulting depth and significance of the relationship: "Whatever my mentor tells me, I believe it to the core. However, this trust and honesty is something we grew into." Participants also shared their appreciation for the emails and "check-ins" received from their mentors; and acknowledged such efforts in light of the high levels of responsibility and the workloads of these executives.

> "The occasional email or check-in seems obvious, but they are so important. He's an executive and it would be very easy for him to get lost in his responsibilities and other work and forget about me – just do the quarterly

meetings. But no, he goes out of his way to see how I'm doing and that I have everything I need. There's often an ongoing email dialogue even if he's out of the office." (Fast-Trak Mentee)

Several spoke of mentors who would "go out of their way" to ensure that mentees had what they needed to succeed. Such attention was seen by mentees as instrumental in the development of their own "relationship-based" management styles and approaches. As stated by one mentee:

"Because of my mentor, I am better at communicating my issues so as to be able to determine solutions. This reduces my stress at work.... It is so important to learn the human aspect of things and learn how to manage through <issues>." (Mentorship Program for Business Professionals Mentee)

Some mentees spoke of the importance of having a mentor at arm's length.

"If you have a mentor in a different company who's detached from your company and your daily activities you can tell them your problems, you can vent your problems - take your "beef" out with them." (Fast-Trak Mentee)

Other mentees also remarked on the benefits of having a mentor at a different company:

"I was able to get a different perspective on my career from someone who had no real stake in it. It's difficult sometimes to have such conversations with your peers or your boss about how your career is going, and how you'd like it to develop. So just having a sounding board – someone who was very senior and had a lot of experience – had a lot of value."

(Mentorship Program for Business Professionals Mentee)

Corporate Perspective

Opportunities to share the insights and perspectives of executives who, in the words of one mentee, are "where I might like to be someday," were seen as valuable components of the mentoring experience. Many spoke of enhanced understanding of the "big picture," and of seeing their daily tasks in light of overall company goals and initiatives. For Mentorship Program for Business Professionals Mentees, opportunities to attend high-level company meetings with their mentors were characterized as valuable experiences in the development of their own corporate perspectives.

"My mentor includes me in a lot meetings; makes sure I tag along. He includes me in a lot of things that I may not be working on; but it's important for me to be there so I get the whole picture of the company in general. It really helps."

(Fast-Trak Mentee)

Networking

A number of mentees shared that their personal networks had grown considerably through the opportunities provided by their mentorship program:

> "I feel that the whole purpose of the program is to enhance your network and to give you the opportunity to know executives and people in other departments.... to feel comfortable talking with them." (Mentorship Program for Business Professionals Mentee)

Others echoed the following statement:

> "Having a mentor opens that door. That's a unique opportunity that not many people get to experience; it puts things into perspective. And the feeling of being involved in those meetings makes you feel good; lets you know that the company values you; and that someday you could be part of these meetings <as an executive>...." (Mentorship Program for Business Professionals Mentee)

Mentees who were offered such opportunities gave the company high marks for its provision of networking opportunities both within and outside the mentorship programs: "

> "Meeting so many people at so many different levels and often within so many

different XYZ Corporation companies. This opens up career opportunities and <avenues of> support." (Mentorship Program for Business Professionals Mentee)

Some mentors were also lauded for their willingness to help expand mentee networks through arranging or recommending meetings, and for their attention to mentee progress in this regard.

"There are countless networking events within the different departments. Anytime an opportunity comes up, my mentor tries to expose me to <new experiences>. He'll often try to provide me with networking opportunities; he'll say, 'you should meet this person', or introduce me [to other XYZ employees] while telling me about their area – 'This will be a beneficial contact for you to have.' I'm also sure if there was anyone I wanted to meet that would be helpful to me, my mentor would reach out for me." (Fast-Trak Mentee)

Other mentees were seeking richer networking experiences. Some participants recognized the importance of this aspect of mentorship, and its absence within their own experiences, but were unsure of ways to approach this topic with their mentors.

"We've talked a lot about leadership and networking and my future in broad brush strokes, but nothing came of it. He would just say, "you should get to

know "x" group," for example. But a lot about working here is not necessary knowing every thing but knowing where to find the answers. You need to meet the people who can provide you with the information, so networking is invaluable." (Fast-Trak Mentee)

Mentees highlighted the development of a "sense of team" among participants upon the launch of the peer-to-peer subgroup of the Mentorship Program for Business Professionals, noting the value of quarterly networking sessions and the informal, open dialogue that occurred in these settings. In some instances, mentees reported spending time with one another during breaks, and meeting with others to take part in leisure activities outside of the regular program schedule in order to foster a sense of team and mutual support. Some indicated that they intended to maintain contact with members of their cohort group following completion of the program.

"This program provides an incredible opportunity. You're meeting so many people at so many different levels, and often within so many different companies. This opens up career opportunities and <avenues of> support. If you need information, for example, there is a much broader pool to draw from now – everyone's under the same umbrella." (Mentorship Program for Business Professionals Mentee)

Both mentors and mentees recommended the provision of additional opportunities for mentees to network with others in the same program, or those who had recently completed the program.

> "I wish I had had a mentor, my personal feeling is that it's a really good thing. I never had anyone [mentoring] me, you found out the hard way...." (Mentorship Program for Business Professionals Mentor)

It was felt that such linkages would provide opportunities to capitalize on the learning and experiences of their peers. It was noted that while the Program for Business Professionals recognized the benefit of such relationships through the development of peer-to-peer mentoring, mentees from other programs could also benefit from the implementation of both face-to-face and virtual peer networking opportunities.

"Insider" Status

Among those involved with mentors who routinely provided access to meetings with senior management groups, participants indicated the value of hearing "high-level discussions" and observing practices and processes that were several stages removed from their experience level. In terms of relationships and interactions, many mentees indicated their increased comfort level in dealing with managers, and their discovery that most were very

approachable. In addition, mentees noted that they valued experiences whereby mentors would discuss company directions and plans, with one mentee sharing:

> He would help me understand, for example, why the company is moving in a certain direction or why certain things were happening – he offered me insight." (Mentorship Program for Business Professionals Mentee)

This sense of "insider status" was highly valued by program participants who were provided with such opportunities.

Concerning mentee access to senior levels of the company, mentors and mentees noted the differences among approaches of mentors within the Mentorship Program for Business Professionals:

> "There's visibility there that's not present for <those studying for> other designations like CMA or CGA. The MBA's are more top of mind." (Mentorship Program for Business Professionals Mentee)

Divergent approaches to mentee access to senior management processes were noted throughout evaluation processes, with some mentors indicating concern over the perceptions of other team members who had not had opportunities to join senior team meetings, and the potential for negative impacts related to providing such access to the Mentorship Program for Business Professionals mentees.

"If we're going to offer <access to high-level meetings> to the Mentorship Program for Business Professional mentees, it needs to be standardized, formalized and documented. <We have> to ensure that by engaging our MBA students, we're not disengaging others." (Mentorship Program for Business Professionals Mentor)

Questions around when and how to terminate the practice of including mentees in senior meetings were also raised, with participating mentors suggesting the need for further dialogue within the company to standardize approaches and practices in this regard.

Mentors as Role Models

Participants spoke of the importance of developing an understanding of XYZ's "corporate culture" among new employees and mentees and of the value of role modelling in the recognition and adoption of company values.

"A lot of <what> I take away has to do with how my mentor carries himself, how he interacts with other people when he conducts business at various levels. It's very easy to throw on a persona, but to see him treat everyone the same, from someone in billing to another <senior position>; he treats everyone with the same respect." (Mentorship Program for Business Professionals Mentee)

Mentees who received this type of learning opportunities, spoke of lessons learned through observing their mentor interacting with others:

> "My mentor taught me critical thinking, how to approach people in a diplomatic way and how to slow everything down. When you're having trouble getting to an objective just slow everything down and just think about it. This advice has helped me the most, and it's helped me in life in general. It's something I'll always remember." (Fast-Trak Mentee)

Mentees also appreciated the opportunity to glean insights regarding desired traits and qualities in senior managers at XYZ though observing their mentors.

> "I learned how to hold my own in different corporate environments; the different traits that XYZ looks for – being driven, accountability, owning your work. I saw how my mentor conducted himself in different settings. During our meetings there were always people coming into his office. I could see how he treated them and I could hear him on the phone, understand the atmosphere, what leadership qualities he has – just by observing him." (Fast-Trak Mentee)

Finally, mentors exhibited several positive qualities highlighted by mentees, including friendliness, respect, professional conduct, critical thinking skills, diplomacy and patience. Such qualities were characterized by participants

as indicative of "XYZ values," and the esteem in which such values were held by mentors.

Benchmarking Progress

Participants noted the role of mentors in enhancing work performance by providing information about what to expect in their positions, what deliverables should look like, and what managers require of them. Noted areas of enhanced work performance were related to presentation competencies, confidence levels, prioritization skills, and the application of feedback to improve outcomes. Fast-Trak participants in particular suggested that documented program benchmarks might be helpful in assessing their advancement and progress. Correspondingly, some suggested that a formal mechanism for follow-up and tracking of outcomes both during the program and post-program be implemented to allow for meaningful assessment of program efficacy.

The importance of "mapping out" career paths and approaching the identification and benchmarking of career goals was seen as beneficial by both mentors and mentees. While it was suggested that overall success within the Mentorship Program for Business Professionals could, in part, be measured against the number of participants to achieve accreditation in their respective designations; those within the Fast-Trak expressed uncertainty regarding ways to measure their success. The majority of participants in the Fast-Trak program indicated that they were initially drawn to the program because of its emphasis

on "fast tracking," and the opportunity to gain experience, corporate knowledge and work place acumen through involvement in a structured accelerated leadership program. Some, however, indicated that they were unsure as to the degree of "fast tracking" that had been realized as a result of the program; and suggested that the development of formal benchmarks, goals and outcomes within program documentation would be helpful in this regard.

Career Mindset

Some mentors indicated that their approach involved encouraging mentees to treat their work terms as a segment of their careers, and not simply as a training exercise. Such an approach was characterized by mentees as helpful in their professional development in terms of increased accountability, enhanced "ownership" of work-term tasks, and more efficient career-mapping skills. As stated by one mentee, "The mentoring program helped me mature from a student into a young professional."

> "I have more accountability now; my mentor taught me to put everything into the work in front of you. My mentor's advice made me be accountable for everything, and to own the work I was doing. He helped me transition....to realize that it's not just for now, but that this is going to shape what happens <next>. He showed me how taking initiative early in your career is crucial." (Mentorship Program for Business Professionals Mentee)

Career Advancement

Mentors expressed satisfaction related to the provision of guidance and support in developing career plans and reaching professional milestones among mentees.

> "It's been a wonderful feeling to see my mentee grow from when he first started and was very quiet, with not a lot of exposure to the business world – to watch him grow and learn and to have transferred some of my experiences." (Mentorship Program for Business Professionals Mentor)

Likewise, mentees valued the dyadic relationship in its contributions toward the identification of training opportunities and resources for advancing their careers. It was deemed especially helpful among those involved in designation programs to be paired with a mentor with a similar background, in order to share experiences and advice related to their respective programs. According to one mentee, "I needed to know what I could do with the designation – career options, actual positions. My mentor helped me a lot with this." Another highlighted the value of having a "sounding board" who was neither a peer nor a direct supervisor:

> "I was able to get a different perspective on my career from someone who had

no real stake in it. <Having access to> someone who was very senior and had a lot of experience had a lot of value." (Fast-Trak Mentee)

Teaching/Learning

"My mentor always makes sure I understand what he's trying to help me with, or he stops by and asks, 'How's everything going?' or 'I heard you did really well with this; how can I help next time (if there were any issues)?' When he's teaching me something, he always goes back and makes sure that the connections he intended me to make were actually made." (Mentorship Program for Business Professionals Mentee)

Mentors approached the teaching and learning aspects of their relationships with mentees in diverse ways. For some, this translated to having mentees observe them while they worked; while others would provide an overview of a problem or issue and have the mentee research and present different approaches for feedback. Other mentors reviewed mentees' work: "We'll sit down and go through it. If anything is wrong or needs to be changed, he'll walk me through it." Mentees also characterized the value of experiential learning opportunities.

"I prepare when I meet my mentee. I typically look at the competency map prior to our monthly meeting so I know where my mentee is in terms of the professional associations' expectations. I meet fairly regularly with my mentees' work-term supervisor. I wouldn't go to the meeting without that information. I'll know from talking with work-term supervisors about any challenges or successes." (Mentorship Program for Business Professionals Mentor)

Mentors were attributed with providing invaluable knowledge related to whom to approach when problems occurred, and to implications regarding "chain of command" at XYZ. Further, mentees benefited from the availability of a "listening ear" at senior levels in making informed choices and dealing with workplace challenges.

"It just helps to talk things through. Even in general, we'd do that for various dilemmas I might have; we'd talk through it and figure out what I might do. He'd provide different perspectives and help me make a more informed choice." (Mentorship Program for Business Professionals mentee)

Building a Culture of Mentoring

"They're excited about [mentoring] and that's just really great to see. They don't just think 'Oh, I've got to tick this off the list of things I have to do for work'.

They really want to be a part of this, to be mentors. " (Mentorship Program for Business Professionals Mentor)

"We've had a couple who have come through the program recently and are now peer mentors. Mentees shared their belief in the ongoing development of a culture of mentorship at XYZ. (Mentorship Program for Business Professionals Mentee)

Overall, both former and current program participants expressed satisfaction regarding their involvement in the mentoring program. In fact, many from the Mentorship Business Professionals Program, or those having just graduated with an MBA, have become peer mentors to new intakes. Participants shared their sense of responsibility for "giving back" to the company, and for providing the same level of support to new hires that they experienced:

Mentees shared their belief in the ongoing development of a culture of mentorship at the company.

"Having been given this first mentoring experience, I now approach other people. I currently have other informal mentors and have looked for other people that align with my strengths and weakness. This is how I'm now forming my career path and seeing what's here for me at XYZ." (Mentorship

Program for Business Professionals Mentee)

Likewise, mentors affirmed the relevance of mentorship to career progression and growth within the company: "When they come out of the program and we ask them to be mentors, they <need to> understand that that is a natural progression within their career development. That <mentoring> is not an 'above and beyond'; that it is just part of being a leader within XYZ."

"I think part of my role as a mentor is creating an awareness about what a mentor can be for our people, and helping mentees understand that we consider that <mentoring> is part of their future role as potential Business leaders within XYZ." (Mentorship Program for Business Professionals Mentor)

Survey Outcomes

The purpose of this data collection effort was to investigate individual perspectives regarding the execution of XYZ mentoring efforts, as well as perspectives on participants' personal experiences.

Methodology

The initial task of this phase involved the creation of an online survey to be sent to mentor/mentee participants. Survey items included a series of rating scale and open-ended questions. Rating scale questions employed a 6-point scale, where "1" denoted strongly disagree, "3" indicated neutral,"5" referred to

strongly agree and "6" indicated "Not Applicable." Open-ended questions provided participants with the opportunity to highlight examples of program strengths and weaknesses, and to suggest potential actions that could be considered in conjunction with the initiative. It should be noted that with the limited number of survey respondents, it would not be appropriate to attempt to generalize responses to a larger population. Rather, these results provide a "snap-shot" of the perspectives of individual participants at one point in time, and as such, may provide insights into program components or processes.

Specific themes investigated included:

- Meeting functionality, logistics and general details
- Activities typical in or during meetings
- Personal/developmental benefits
- Knowledge transfer and personal learning
- Mentee/mentor perceptions
- Quality of mentorship programs

Resulting datasets were analyzed to identify key themes related to the focus of the evaluation. Themes were subsequently sorted and organized, and are presented below.

Results: Mentorship Program for Business Professionals

Six mentees completed the online survey; five reported having had previous mentor experience. On average, dyads met at least once per month,

with meetings generally lasting 30 minutes. Regarding additional communications with their mentors outside of face-to-face meetings, five participants indicated that they used technology moderately; one indicated that a significant portion of communication was digitally based.

Participants were asked to identify the types of activities that might occur during a typical mentoring meeting. Half of the participants agreed that discussions related to developing their talents and skills within XYZ had taken place. Five of six affirmed that discussions regarding organizational challenges and transformations had occurred, with the same number indicating that they received feedback on their achievements and goals. With respect to conversations regarding work-life balance, four of the six mentees reported such conversations, and all agreed that discussions related to challenges at work took place during typical mentoring meetings. Three of the six participants reported that the purpose of mentorship meetings was outlined, as were ways to build a network of contacts.

Table 3 Activities typical in or during mentor meetings as reported by Mentorship Program for Business Professionals Mentees

Survey Question	Yes	No
Discussions on ways to develop talent and skills within the context of the organization	3	3
Discussions on organizational problems and transformations	5	1
Discussion on ways to balance work and family	4	2
Discussions of challenges at work	6	0
Discussion on ways to build networking contacts	3	3
Identification of practical opportunities to test new skills	4	2
Clarification of organization's objectives and strategies	2	4
Feedback on achievements and outcomes of the development goals	5	1
Defining of the purpose of the meeting/outline of the meeting	3	3

When asked about the developmental benefits that emerged as a result of mentored learning, responses varied. Half of participants indicated that their mentors either helped them identify career-based motivations, or identified resources to support their career advancement. Regarding mentor support in identifying weaknesses in mentee skill sets, responses were equally split among *neither agree nor disagree*, and *somewhat or totally agree*. Three participants indicated that due to mentoring, they were better able to map out the direction of their professional life and to better face challenges related to their career stage.

All mentees indicated that they either *somewhat or totally agreed* that mentoring opened up new career perspectives and enhanced their professional

experiences. Five participants either *somewhat or totally agreed* that mentoring enabled them to improve identified gaps in their skill set, and supported them in advancing their careers. When asked if mentoring helped them manage specific, measurable, attainable, realistic and time-framed goals; three participants indicated that they *neither agreed nor disagreed* (or that it was not applicable), and three *somewhat or totally agreed* with the statement.

When asked if they felt that being a mentee had been a struggle at times, one mentee indicated agreement; while all others either *totally or somewhat disagreed* that this was the case. Four of the six mentees reported that their mentor had either *somewhat or totally enhanced* their self-confidence, while one disagreed, and one indicated that the question was not applicable.

Table 4 Personal/developmental benefits as reported by Mentorship Program for Business Professionals Mentees

Survey Question (N=6)	Totally Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Totally Agree	Not Applicable
Identifies the resources and support available for my development	17%		17%	33%	17%	17%
Helps me better identify what motivates me	17%		17%	50%		17%
Poses a struggle for me at times	67%	17%		17%		
Enables me to better define the direction I want my professional life to take				33%	50%	17%
Provides added value that I can use to advance my career			17%	33%	50%	
Opens up new career perspectives				33%	67%	
Enhances my professional experience				33%	67%	
Enables me to better face the challenges related to my career stage				33%	50%	17%
Helps me manage specific, measurable, attainable, realistic and time-framed goals			33%	33%	17%	17%
Enables me to develop/update identified gaps in my skill set			17%	67%	17%	
Identifies weaknesses in skill sets that need development			50%	33%	17%	
Enhances my self-confidence		17%	17%	67%	17%	

Mentee participants were asked to indicate the extent to which they thought mentoring influenced their personal development and contributed to knowledge transfer and personal learning. In regard to learning about both conflict resolution strategies and complex problem solving, two of the six respondents indicated that there was *no influence*. When asked about building networks and coalitions and establishing clear goals and objectives, participants were either *significantly or highly influenced* by their participation in the program. Four of six indicated that the program had a *moderate or lower influence* on their ability to communicate with clarity, manage dynamic relationships, and develop interpersonal and strategic thinking skills

Table 5 Knowledge transfer and personal learning focus as reported by Mentorship Program for Business Professionals Mentees

Survey Question (N=6)	No Influence	Some Influence	Moderate Influence	Significant Influence	Very High Influence
Applying conflict resolution strategies	33%	17%	17%	17%	17%
Building networks and coalitions	17%	17%		50%	17%
Establishing clear goals and objectives		33%		67%	
Developing complex problem solving strategies	33%	17%	33%	17%	
Enhancing clarity in communications	17%	33%	17%	33%	
Managing dynamic relationships		17%	50%	33%	
Enhancing interpersonal skills		33%	33%	17%	17%
Developing strategic thinking	17%	17%	33%	33%	

All participants either *somewhat agreed or totally agreed* that they felt guided and understood, and that their mentor supported them in adapting to changes within the organization. Five of six indicated that they *totally agreed* that their mentor supported their efforts to upgrade their skills, and that their mentors listened to them attentively. Three of six felt an appropriate level of challenge in their programs; and four indicated that they felt inspired by their mentors.

Table 6 Program perceptions as reported by Mentorship Program for Business Professionals Mentees

Survey Questions (N=6)	**Totally Disagree**	**Somewhat Disagree**	**Neither Agree nor Disagree**	**Somewhat Agree**	**Totally Agree**
Challenged at a level that is within my capability		17%	17%	17%	50%
Supported in adapting to the changes within the organization (as applicable)				50%	50%
Supported in my efforts to upgrade my skills				17%	83%
Listened to attentively				17%	83%
Inspired			33%	33%	33%
Guided				67%	33%
Understood				33%	67%

When asked whether their mentors were not only engaged in, but also prepared for their role as mentor, five of six mentees indicated that they *totally agreed* with this statement. The same number of mentees indicated that their mentors provided them with networking opportunities, and helped them identify potential ways to work toward career goals. Three of six *neither agreed nor disagreed* that their mentors helped them identify weaknesses, or discussed or understood their learning preferences.

Most mentees agreed that their mentors helped them make informed decisions. Five of six indicated that they either *agreed or totally agreed* that mentoring added value to their learning efforts; that mentoring helped identify or

provide resources and support for their future development and learning goals (including training, upgrading, assigned work/exercises, assigned reading, etc.); and that their mentor provided them with real-world learning experiences.

Table 7 Mentor perceptions as reported by Mentorship Program for Business Professionals Mentees

Survey Questions (N=6)	Totally Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Totally Agree
Is sufficiently prepared for his/her role				17%	67%
Helps me learn by adding examples of real world problems or case studies			17%	67%	17%
Helps identify weaknesses in skill sets that need development			50%	33%	17%
Discusses and understands my learning preferences			50%	33%	17%
Provides me with networking opportunities			17%		83%
Helps me identify potential ways to work toward my career goals				17%	83%
Helps me make informed choices				50%	50%
Identifies/provides resources and support available for my development or related to my learning goals			17%	50%	33%
Is engaged in being a mentor				17%	83%
Adds value to my learning efforts			17%	33%	50%

When asked about the overall quality of the Mentorship Program for Business Professionals Mentees, four of six mentees indicated that they *totally agreed* that the program had adequate resources and backup support, was consistent with the organizational goals for learning and development, and was consistent with leadership behaviours and values of XYZ. The same number agreed that XYZ has an attitude that facilitates innovation and experimentation with new ideas. Opinions varied among participants when asked if the goals of the mentoring relationship were jointly defined at the outset, and if the program was well structured.

Table 8 Quality of mentorship programing as reported by Mentorship Program for Business Professionals Mentees

Survey Question (N=6)	Totally Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Totally Agree
The goals of the mentoring relationship were jointly defined from the outset.		17%	33%	17%	33%
The mentoring program is well structured.		33%	17%		50%
The organization has an attitude that facilitates innovation and experimentation with new ideas.				67%	33%
The program has adequate resources and backup support.			33%		67%
The program is consistent with the organizational goals for learning and development.				33%	67%
The mentoring program I participated in is consistent with leadership behaviours and values of the organization.			17%	17%	67%

Mentees were, overall, satisfied with the mentoring program and the support provided by the Mentorship Program for Business Professionals

coordinator. While some felt they might be better prepared to participate in mentorship, ratings were consistently high related to program implementation. Regarding identified problems within their programs, participants consistently indicated few challenges or concerns.

Table 9 Satisfaction as reported by Mentorship Program for Business Professionals Mentees

Survey Question (N=6)	
Indicate your overall satisfaction as a percentage	83%
Support received by mentorship program coordinator	81%
Your preparation	73%
Preparation by your assigned mentor	78%
Method for making introductory contact between mentor and mentee	75%
Relevance of match	75%

Table 10 Problems as reported by Mentorship Program for Business Professionals Mentees

Survey Question (N=6)	Yes	No
Experiencing issues pertaining to confidentiality	0	6
Seeing beyond my personal views	1	5
Speaking directly and communicating my thoughts in depth	1	5
Understanding my mentor's position as expert	0	6
Being able to learn from mentor's expertise	0	6
Expressing my apprehensions and fears	0	6
Experiencing a lack of understanding regarding my mentor's role and responsibilities	0	6
Experiencing a lack of understanding regarding my role and responsibilities	0	6

Explaining my needs with clarity	0	6

Results: Fast-Trak Program

The five participating mentees were asked to identify activities included in a typical mentoring meeting. All agreed that discussions had taken place related to the development of their talents and skills, as well as to challenges that occurred at work; and that the purpose of the meetings were outlined and/or defined. Four of five affirmed that discussions regarding organizational problems and transformations had taken place, with the same number indicating that they received feedback on their achievements and goals, as well as clarification of the organization's objectives and strategies. Most shared that practical opportunities had been identified to test new skills; however, four of five indicated that discussions related to work/life balance were not typically part of mentoring meetings. Similarly, when asked about support in their efforts to build networks within the company, three of the five surveyed reported that such discussions were generally not undertaken during mentoring meetings.

Table 11 Activities typical to a mentoring meeting as reported by Fast-Trak

Survey Question	Yes	No
Discussions on ways to develop talent and skills within the context of the organization	5	0
Discussions on organizational problems and transformations	4	1
Discussion on ways to balance work and family	1	4
Discussions of challenges at work	5	0
Discussion on ways to build networking contacts	2	3
Identification of practical opportunities to test new skills	4	1
Clarification of organization's objectives and strategies	4	1
Feedback on achievements and outcomes of the development goals	4	1
Defining of the purpose of the meeting/outline of the meeting	5	0

Regarding personal development and knowledge transfer, two respondents indicated that the program had *no influence* on conflict resolution strategies and strategic thinking, while the remaining participants reported *significant or very high* growth in these areas. Three of five indicated that the program had a *very high influence* regarding improved communication and interpersonal skills, and all five mentees agreed that the program significantly improved their abilities to establish clear goals and objectives. When asked to indicate the extent to which they thought the mentorship program influenced their ability to build networks and coalitions, attend to complex problem solving and manage dynamic relationships; three of five mentees reported that they were *highly influenced* by their mentor.

Table 12 Personal/developmental benefits as reported by Fast-Trak mentees

Survey Questions (N=5)	**Totally Disagree**	**Somewhat Disagree**	**Neither Agree nor Disagree**	**Somewhat Agree**	**Totally Agree**
Identifies the resources and support available for my development		20%	20%	40%	20%
Helps me better identify what motivates me		20%	20%	60%	
Poses a struggle for me at times		60%	20%	20%	
Enables me to better define the direction I want my professional life to take				60%	40%
Provides added value that I can use to advance my career		20%			80%
Opens up new career perspectives			40%		60%

Enhances my professional experience		20%		20%	60%
Enables me to better face the challenges related to my career stage		20%			80%
Helps me manage specific, measurable, attainable, realistic and time-framed goals			20%	80%	
Enables me to develop/update identified gaps in my skill set		20%			80%
Identifies weaknesses in skill sets that need development		20%			80%
Enhances my self-confidence			20%	20%	60%

Table 13 Knowledge transfer and personal learning as reported by Fast-Trak mentees

Survey Question (N=5)	No Influence	Some Influence	Moderate Influence	Significant Influence	Very High Influence
Applying conflict resolution strategies			40%	60%	
Building networks and coalitions			20%	40%	40%
Establishing clear goals and objectives					100%
Developing complex problem solving strategies		20%	20%	20%	40%
Enhancing clarity in communications			20%	20%	60%
Managing dynamic relationships			20%	40%	40%
Enhancing interpersonal skills			20%	20%	60%
Developing strategic thinking			40%	40%	20%

Ratings were mixed regarding participant perspectives on whether they felt challenged within their capabilities; while a majority reported feeing guided, understood, listened to and supported in efforts to upgrade their skills. Notably,

one to two responses in each category indicated either disagreement or inapplicability regarding these individual program supports.

Table 14 Program perceptions as reported by Fast-Trak mentees

Survey Question (N=5)	Totally Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Totally Agree	Not Applicable
Challenged at a level that is within my capability		20%	20%	40%		20%
Supported in adapting to the changes within the organization (as applicable)			20%	20%	40%	20%
Supported in my efforts to upgrade my skills				40%	40%	20%
Listened to attentively				40%	40%	20%
Inspired		20%		20%	40%	20%
Guided		20%		40%	20%	20%
Understood		20%		40%	20%	20%

In reporting participant perspectives related to mentor qualities and approaches, most mentees agreed that their mentor was both engaged in and prepared to undertake the role of mentor. The majority also indicated that their mentor helped them identify gaps in their skill sets, make informed choices, identify way to work toward career goals, and utilize real world problems to support learning. Further, most felt that their mentors understood their learning preferences, and provided them with networking opportunities.

Table 15 Mentor perceptions as reported by Fast-Trak mentees

Survey Question (N=5)	Totally Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Totally Agree	Not Applicable
Is sufficiently prepared for his/her role			20%	20%	60%	
Helps me learn by adding examples of real world problems or case studies		20%		40%	40%	
Helps identify weaknesses in skill sets that need development		20%		40%	40%	
Discusses and understands my learning preferences				50%	50%	
Provides me with networking opportunities		20%		60%	20%	
Helps me identify potential ways to work towards my career goals		20%			80%	
Helps me make informed choices			20%	20%	60%	
Identifies/provides resources and support available for my development or related to my learning goals		20%	20%	20%	40%	
Is engaged in being a mentor			20%	40%	40%	
Adds value to my learning efforts				60%	40%	

When asked about the overall quality of the Fast-Trak mentoring program, the majority of mentees indicated agreement regarding the provision of clearly defined goals of the initiative, the existence of positive organizational attitudes toward innovation, and the provision of adequate resources and backup support. Further, most asserted that the program was consistent with the organizational goals for learning and development, and with the leadership

behaviours and values of XYZ. Opinions varied among participants when asked if the program was well structured.

Table 16 Quality of mentorship program as reported by Fast-Trak mentees

Survey Questions (N=5)	Totally Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Totally Agree	Not Applicable
The goals of the mentoring relationship were jointly defined from the outset.	20%			60%		20%
The mentoring program is well structured.	40%		20%	20%		20%
The organization has an attitude that facilitates innovation and experimentation with new ideas.	20%			40%	20%	20%
The program has adequate resources and backup support.	20%			60%		20%
The program is consistent with the organizational goals for learning and development.			20%		60%	20%
The mentoring program I participated in is consistent with leadership behaviours and values of the organization.			20%		60%	20%

Some variability was reported regarding mentees' overall satisfaction and sense of support in the coordination of the program. While other factors were relatively positively rated, participant perceptions in this regard may provide valuable insights in the ongoing development of program structure,

communications and processes. Notably, few participants reported problems related to working with their mentors, which may be indicative of the quality of individuals involved in the dyads, and the joint commitment to professional development with in the program.

Table 17 Satisfaction as reported by Fast-Trak mentees

Survey Question (N=5)	
Indicate your overall satisfaction as a percentage	54%
Support received by mentorship program coordinator	36%
Your preparation	60%
Preparation by your assigned mentor	62%
Method for making introductory contact between mentor and mentee	65%
Relevance of match	64%

Table 18 Problems reported by Fast-Trak mentees

Survey Questions (N=5)	Yes	No
Issues pertaining to confidentiality	0	5
Seeing beyond my personal views	0	5
Speaking directly and communicating my thoughts in depth	0	5
Understanding mentor's position as expert	0	5
Being able to learn from mentor's expertise	0	5
Expressing my apprehensions and fears	0	5

Lack of understanding regarding mentor's role and responsibilities	1	4
Lack of understanding regarding my role and responsibilities	0	5
Explaining my needs with clarity	1	4

Summary Program Reflections and Recommendations

This section of the report provides an overall summary of key program strengths, and identifies service delivery issues and areas for program enhancement for the XYZ mentoring programs at the corporate level. In response to each service delivery issue, suggested actions for future program or service delivery enhancement are noted, as are potential self-assessment questions. This section also provides recommendations for operationalizing XYZ's mentoring efforts based on evaluation findings, and aims to provide analyses that could inform the design of future XYZ mentoring programs, and that could serve to deepen and extend future mentoring activities.

The programs reviewed represent mentoring activities at a very early point in XYZ's attempts to implement mentoring programs that meet the needs of both the corporation and its employees. This investigation is not intended to be perceived as a summative review, but rather as a formative evaluation designed to enhance understanding, identify areas for priority action, and buttress the efforts of XYZ to expand learning opportunities for employees, as well as to support the company in its efforts related to succession planning.

Program Philosophy

XYZ's instituted mentoring programs within various sub-companies are intended to:

- Buttress succession planning
- Cultivate the next layer or generation of XYZ leaders
- Manage skills training and/or certification
- Orient new hires
- Increase retention (unstated/implicit)
- Encourage networking (unstated/implicit)

The objectives are consistent with reported participant perspectives related to the overall intent of the XYZ mentoring efforts. Mentee/mentor participants, for the most part, indicated that the mentoring programs assisted mentee participants in building both their self-esteem and confidence while expanding their scope of knowledge within their career scope and XYZ's corporate culture. Many also indicated that the mentoring programs provide strong examples of demonstrated leadership and professionalism that were of benefit to mentees as they conceptualized and planned their own career paths.

Self-Assessment Questions

- Does the program have mission and vision statements that are reflective of corporate culture and operations?

- Does the program have clear and achievable goals with measurable outcomes?
- Can the model serve as a road map for program evaluation?
- What are the mentoring models and best practices that can inform the development and evolution of XYZ's various mentorship programs? [2]

Organizational Support

Without exception, participants supported XYZ's efforts to enhance opportunities for the professional and personal development of employees, and were eager to comment and offer program recommendations. Regarding the intent and purpose of the mentoring programs, it could be beneficial for documentation to frame mentoring within XYZ's constellation of learning practices; conveying, in sum, that the XYZ team learns *powerfully* and *collectively*, and is continually transforming itself to better acquire, manage, and use knowledge for corporate success.

Several participants perceived varying levels of ongoing support for the different mentoring programs. In general, employees feel more committed to an initiative if they believe their leaders value it and if they see leaders practice it. Employees' confidence is significantly influenced by the level of management

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[2] Some of the self-assessment questions throughout this section of the document have been adapted from those proposed by (Garringer & MacRae, 2008)

support for programs (Eby, Buitts, Lockwood, & Simon, 2004; Eby, Butts, Durley, & Ragins, 2010; Eby, Durley, Evans, & Ragins, 2008).

Self-Assessment Questions

- How are program coordinators prepared to fully implement the program model(s) that XYZ has implemented?
- Does the program have written manuals that document each program coordinator's roles and responsibilities?
- How often will information be shared between program coordinators and HRD?
- Is there a process in place to ensure that the obligations of the written manuals are met when staff turnover occurs?
- What processes ensure compliance with the program manual?
- Are there processes in place to deal with program coordinators not fulfilling the obligations of the manual?

Networking

The importance of networking at XYZ was a consistent theme among participants. Some mentors reported identifying resources that would enhance their mentees' personal development and career growth, teach the mentee about the importance of networking, and advise him/her on how to make professional contacts. Others were less involved in facilitating networking opportunities for mentees.

The company may wish to undertake discussions regarding these diverse approaches in order to adopt consistent processes related to the provision of mentee access to networking opportunities and high-level meetings relative to each program.

Self-Assessment Questions

- Does training emphasize the centrality of networking to mentoring and, subsequently, the mentor role?
- What specific data should be collected that shows progress toward this outcome?

Program Evaluability

All participants reported a sense of commitment to their programs. They were especially passionate about having an opportunity to enhance program components and processes. In this regard, it may be helpful to develop mechanisms for assessing the extent to which objectives are being achieved. Participants noted the importance of assessing outcomes and cost-benefits in order to ensure that programs and services result in meaningful impacts on the career development of XYZ employees. Additionally, evaluation could help refine and improve programs by tracking key information and statistics.

The following provides a summary of evaluation issues and corresponding suggestions for program enhancements:

- Program efficacy could be tracked through the analysis of data related

to achieved outcomes.

- Outcomes could be compared with success criteria or targets that are defined at the beginning of the program.
- Process indicators could be developed to measure the effectiveness of program policies, procedures and activities.

Self-Assessment Questions

- Does the program have an evaluation plan that measures both the processes and the desired outcomes of the program?
- What are the outcomes that that need to be measured based on the program's mission and goals?
- What specific data should be collected that shows progress toward those outcomes?
- Is there appropriate staffing necessary for data collection and analysis?
- Has an appropriate timeline for conducting evaluations been established?
- Will the program design be based on evidence and best practice?
- Have gaps in mentoring service been identified?
- How will information gathered in the process evaluation be incorporated into XYZ mentoring programing, planning, goals and operations?

Selecting Program Mentors

Many mentees participating in the program spoke powerfully about the impact of working with their mentors. In many companies, potential mentors are screened for several criteria, including technical/professional knowledge, communication ability, organizational level and tenure, past performance, commitment to the mentoring process, credibility, and ability to be an effective role model. The desired qualities and experience levels of individuals to be recruited as XYZ mentors could be further refined.

It may be helpful for intake applications to require mentors to describe the types of assistance and expertise they could provide, and to share such information with potential mentees. Program coordinators should ensure that the mentors have time to commit to the process, and that they are able to model the work style and behaviours that the organization wants to see emulated by mentees.

Self-Assessment Questions

- Does the program have established mentor and mentee intake procedures?
- What are the criteria deemed essential by HRD for participation in the program?
- How is the progress of mentors and mentees tracked?
- Do matching processes include mentor and mentee self-assessment

questions?

- Does the program have a detailed, written screening procedure that is appropriate for the type of mentoring program proposed?
- What are the tools/steps used in the screening process?
- Are face-to-face interviews conducted with prospective volunteers using standard questions?
- How does the screening process allow the program coordinator to gauge an applicant's dependability, motivations, and suitability?
- Who makes the final decision on acceptance or rejection?
- Are there policies and procedures that protect the confidentiality of the applicant?
- Does the program have a written recruitment plan that includes goals for recruitment, and timeline of scheduled activities?
- Does the program have written volunteer "position descriptions" that include responsibilities, requirements, and benefits of mentoring?
- How do XYZ mentoring programs tailor messages to specific groups of prospective volunteer mentors and mentees?
- What type of recruitment material does the program use?
- Are recruitment messages distributed broadly throughout XYZ?
- Is the diversity of staff used to its full advantage in recruiting mentors?
- Are mentors' biographies shared with mentees to facilitate effective pair

matching?

Program Coordinator

Current program documentation does not include a detailed description of the responsibilities of the program coordinator, including the coordinator's role in the case of dyad breakdown or mediation, for example. Program coordinator roles and responsibilities generally include (Eby, Rhodes, & Allen, 2009; Underhill, 2006):

- Developing consistent procedures for recruiting and referring participants
- Overseeing development and implementation of all promotional and educational efforts
- Cultivating and maintaining all necessary contacts and relationships for implementing and maintaining the mentoring programs
- Recruiting, screening, training and supervising mentors
- Matching mentor pairs
- Developing and maintaining all records, policies and procedures
- Coordinating mentoring activities
- Checking in regularly with mentors, tracking, management and mediation
- Developing a plan to recognize program participants
- Developing a plan to evaluate the program, including soliciting participant feedback
- Tracking program statistics

- Documenting the development and implementation of the mentoring program

Self-Assessment Questions

- Does the program orient new and current staff to mentoring programs?
- Are new mentors and mentees properly prepared for their roles?
- Has the program experienced staff turnover that has affected the quality of the program in the past?
- Are program coordinators encouraged to network with other mentoring professionals, researchers and training providers as part of ongoing professional development?
- Who supervises programs and dyads?
- What types of skills and qualifications should such program coordinators have?
- Who administers evaluations and reviews?
- Who provides orientation to program participants?

Best Practices in Mentorship Program Administration

The core activity of mentoring is the development of relationships that will, in turn, enable outcome goals to be achieved (Kram, 1985). The success of mentoring lies in the dyad pair developing and sustaining a trusting and close relationship. Correspondingly, the duration and consistency of a mentoring relationship is very important.

Matching

Appropriate pair matching is important not just for the success of the dyad, but for the overall success of the program. As with recruitment, screening and training efforts, procedures on making matches should align with and reflect the program's mission and objectives.

To help ensure a mutually beneficial mentoring relationship, research indicates that *perceived similarity* in terms of interests and values correlates to program satisfaction. Perceived similarity speeds the development of rapport and trust and can reduce uncertainty for both parties. Similarities such as academic or professional background, interests, or even family circumstances can facilitate the building of rapport within dyads. Other considerations regarding similarity include:

- For the mentor – the fund of relevant knowledge, experience, social capital, and psychosocial and communication ability
- For the mentee – the fund of prerequisite knowledge and experience, communication ability, and learning capabilities (Bozeman & Feeney, 2008; Noe, Greenberger, & Wang, 2002).

Mentors are generally drawn to mentees characterized as having "high potential" or "high ability" rather than those in need of help (Wanberg, Welsh, & Hezlett, 2003). Participatory decision-making or offering participants input into the match process should be a program feature. Participants, for example may be asked to rank a list of mentor/mentee characteristics in order of importance.

Additionally, learning preferences are increasingly significant in light of recent Government of Canada report (2007), indicating that 4.4 million Canadians have a disability (14.3% of the population). Many Canadians have learning disabilities, and all have preferred learning styles. Matching the predominant learning style of both members of the dyad (e.g. activist, reflector, theorist or pragmatist) is worthy of consideration when matching, and will influence the dynamics of the relationship (Trautman, 2007). Existing learning style instruments (e.g. Canfield's Learning Style Inventory) may be helpful in identifying commonalities within proposed mentoring dyads.

Self-Assessment Questions

- Does the program have a written plan for making appropriate matches?
- Has the program determined what criteria are being used for making matches?
- Does the matching criteria reflect the program's missions and goals?
- Do intake and training procedures provide staff with the necessary information to make informed matching decisions?
- Who on staff is responsible for making matches?
- Are the mentees' needs being prioritized in making matches?
- Does the mentoring program prepare mentors and mentees for their first meeting?

- Do the first meetings between mentor and mentees have structure and goals?

Difference in Level or Seniority

Having a mentor of higher rank and long-term experience may augment the likelihood of providing a protégé with valuable mentorship in terms of network breadth. Within the Mentorship Program for Business Professionals program, however, the gap in time since mentor certification has a potential downside, in that the mentor may have only distant memories of the professional accreditation processes being undertaken by mentees. This problem or "gap" has been, to some extent, remedied for participants in the Mentorship Program for Business Professionals cohort with the creation of peer-to-peer mentoring for the academic component. The two other Business programs may benefit from similar program expansion.

For skill development mentoring programs or workplace oriented learning processes for semi-skilled and unskilled employees a model differing from the mentoring model outlined above, it is recommended. For skill development mentoring programs, it is advisable that mentors be only one or two organizational levels above the mentee, so that the mentor is better able to relate to the mentee's experiences (Swap, Leonard, Shields, & Abrams, 2001). Furthermore, mentees may be able to relate to and emulate mentors who are closer to them in rank – they may seem a more realistic model for their

immediate aspirations. In order to avoid inequities within the work group, the mentor should not be in a direct reporting line to the mentee; in other words, the mentor and mentee generally should not, for example, work in the same department.

Dyad Breakdown

Not all dyad matches will be successful. It is important that training address the potential negative outcomes of mentoring – abuse, neglect or just mismatched relationships. Lack of trust, honesty, and respect can lead to breakdowns, as can a poor match. This is a risk that is inherent in any interpersonal relationship. Similarly, these problems can run the gamut from only slightly irritating, to game changer, to tipping point. Generally speaking, the most commonly identified problems are protégé mentor mismatch in values, personalities, and work styles (Eby, et al., 2004; Eby & McManus, 2004).

Research on dyad breakdown is beginning to shed light on the different manifestations and outcomes related to interpersonal mentoring problems. Those noted above do not exhaust the list, and each has a cost-benefit ratio that impacts and applies to formal mentoring relationships within the corporate setting. Research is beginning to offer insights into when and why relationships are high-quality, marginal quality, or dysfunctional. The probability of dyad breakdown can be circumvented to a great degree with participant training and current mentor/mentee matching practices.

Self-Assessment Questions

- Are there processes to provide personalized assistance to mentors and matches that may be in trouble or are facing difficult issues?
- Does the program offer a mentor support group?
- Is the level of satisfaction and feeling of support that mentors have known established?

Accountability and Ongoing Supervision

Research highlights the importance of monitoring matches in order to identify not only signs of general incompatibility or emerging areas of concern on a timely basis, but also to capture highlights and accomplishments. Indicators of potential problems within the dyad include consistently missed appointments, interpersonal tensions, lack of communication, and failure to carry through with the responsibilities of the mentorship program. Those in program management roles suggest that in-person checks may be the most effective means to pick up on unspoken issues or concerns, of assessing the efficacy of mentorship activities and relationships, and of designing appropriate interventions as needed. Monitoring can take place through email communication or online surveys. However, there are advantages to "live" telephone or face-to-face conversations, which allow the program coordinator to collect more in-depth feedback by asking follow-up questions, and also allow for motivational conversations and encouragement. Such monitoring processes can also assist

in identifying characteristics of successful dyadic relationships, which can inform the ongoing development and evolution of a company's mentoring program(s).

Self-Assessment Questions

- Has the program determined which staff members are responsible for monitoring matches?
- Does the program have a written, step-by-step procedure for monitoring matches?
- What is the timeline for checking in with the mentor and mentee throughout the course of the match?
- What information is collected through the monitoring process?
- What information was learned about mentee/mentor participants?
- Are questions and tracking tools in place to ensure necessary information is collected from the dyad?
- What are the "red flags" that might indicate a match is having serious problems?
- How will identified problems be addressed?
- Is the program coordinator properly trained to effectively monitor matches?
- Are program participants comfortable sharing information about the match with the program coordinator?

- How will information gathered during the interim check-in(s) be incorporated into the XYZ mentor training, other supports that the program provides the dyad, planning, goals and operations?
- Have gaps in mentoring service been identified?
- Do program coordinators have access to and understanding of mentoring research and best practice literature?

Efforts invested in recruiting, training and matching participants can experience higher rates of return if adequate and ongoing support is a fundamental element of the program. The supervision and monitoring process should ensure: a) an expedient scheduling of the first meeting post-match; b) continuing training opportunities and/or materials; c) assistance to mentors and mentees in negotiating and achieving goals; d) management of grievances and the provision of positive feedback; and e) completion of appropriate documentation as required (Allen, Eby, & Lentz, 2006b).

Self-Assessment Questions

Are the following questions addressed in the interim check conducted by the program coordinator?

- Describe your mentorship experience to date.
- Describe your level of interaction with your mentor.
- Is any component missing or in need of adjustment which would make the mentoring program a more effective support system?

- By how many people has your network expanded since you began the program?
- How many within this number are attributable to your mentor?
- By how many people has your network expanded since the last time we spoke?
- How many within this number are attributable to your mentor?
- Do you have questions or concerns at this time?
- Do you need any clarification on any of the goals/functions/objectives of the mentorship program?
- What is the approximate amount of time devoted to the mentoring relationship?

Mentor Recognition

Volunteers are the single most important assets of mentoring programs; thus, retention of mentors is crucial. Recognition of mentoring milestones or success may play a role in the success of both retention and recruitment efforts. Studies have shown that volunteers who have not been recognized for their contributions are more likely to stop participating (Hage & Brudney, 2004).

Self-Assessment Questions

- Is public mentor recognition built in to the mentoring program?
- Is the program, including highlighting individual matches, profiled on the internal/external corporate website or in company newsletters?

- How well and how often are mentors recognized and thanked for their efforts?

Training

Training provides participants with tools, behaviours, and skills that they can access as needed, including those related to conflict-resolution, role modeling, negotiation, and motivation techniques (Allen, et al., 2006b; Garvey & Alred, 2000). Further, effective training is purported to enhance awareness of benefits, lead to more rewarding and fulfilling mentoring experiences, and improve performance and commitment among mentors (Allen, Eby, & Lentz, 2006a; Allen, et al., 2006b; Parise & Forret, 2008). Correspondingly, participant training and orientation have been emphasized as important in jumpstarting not only the program, but also the dyad relationship (Scandura & Williams, 2002). The receipt and quality of training correlate to perceptions of the effectiveness of the program, in that participants who feel supported, and are provided with the resources and skills to be successful, are more apt to return to the program (Hung, 2003).

Pre-Service Training

Research on the development of pre-service training for mentors and mentees specifies that training should include: a) the clarification of program objectives; b) discussion of the program requirements and procedures; c) instruction on how to set expectations and boundaries within relationships; d)

discussion on how to handle a variety of common situations; and e) concepts and strategies to help build the relationship between mentors and mentees (Ramaswami & Dreher, 2007).

Self-Assessment Questions

- Does the program offer pre-match training sessions for both mentors and mentees?
- Do the trainers have the necessary skills, training and knowledge to conduct these sessions?
- Does pre-service training convey the mission, goals and desired outcomes of the program?
- Does pre-service training clearly outline the responsibilities, qualifications and rules for participating in the program?
- Does the training effectively "sell" the mentoring program?
- Does the content of training fit with recruitment, screening, and matching procedures?
- What does the program learn about prospective participants during pre-service training, and how is that information applied later?
- Has the training design taken into account ways to best serve targeted groups?

Ongoing Training

Ongoing training or periodic workshops or sessions that focus on building additional skills as relationships progress should be considered. Topics addressed may include issues brought forth by mentors, mentees and staff. A support system can guide participants through the mentoring journey. Support sessions allow mentors to share their successes, get advice and support from other mentors who are facing similar challenges, ask questions of staff members, learn about resources, and build a stronger sense of connection to the program as a whole (Eby, et al., 2009; Parise & Forret, 2008).

Self-Assessment Questions

- Does the program offer ongoing training? If so, how often, and what processes are used to determine these additional training topics?
- Does the program coordinate additional informal support opportunities online or in group settings where mentors and mentees can seek advice and gain support within their own cohort?
- Does the program have written training curriculum that reflects the goals of the program and the nature of mentoring relationships?
- Are the following topics addressed in the training curriculum?
    - Program policies, procedures and goals
    - Mentor and mentee roles
    - Strategies for beginning

- Communication skills
- Diversity issues
- Networks of support

- Does the program utilize all training resources? Could the training be improved by drawing from other individuals?
- Have evaluations of training been conducted? If so, what is done with the results?

Match Closure and Structured Exit Interviews

Most matches will come to a close naturally at the end of the structured program; others will end prematurely because of a variety of factors. It is important that a structured process be in place to help mentors and mentees reach closure and/or renegotiate the relationship at the scheduled or unscheduled conclusion of the program. The implementation of a structured exit interview approach is critical to capturing and understanding key participant barriers to program engagement and to understanding program successes.

Self-Assessment Questions

- Why have some matches ended prematurely?
- What are the indicators that a match may need to be terminated?
- Are there written procedures for handling match closure?

- Is the closure procedure flexible enough to handle the many circumstances that lead to matches dissolving?
- At the close of a program, does the program coordinator coordinate the exchange of handwritten letters of appreciation or other communiqués of acknowledgment?
- How can dyads be supported when renegotiating the relationship at the end of the program?
- Is information on match closure incorporated into ongoing mentor training?

Conclusion

Mentorship is directly relevant to key XYZ objectives regarding the development of human potential. The outcomes of the various data collection activities revealed a range of cited strengths related to the overall program structure and practices. Three key areas of strength were specifically highlighted in this review: positive and dedicated participants; participants dedicated to creating a mentoring culture; and stories of program impact and success. Many participants spoke of powerful developmental relationships and expanding networks that served their unique career needs and goals. Mentoring was recognized as a robust tool that offers a holistic approach to learning new skills, gaining new self-knowledge, building performance and career capacities, and establishing avenues for ongoing personal growth. It is hoped that mentor and

mentee input captured within this evaluation can be used to guide the prioritized implementation of specific mentoring interventions and enhancements at XYZ Corporation.

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Chapter VI: Discussions

This chapter will finalize the main findings and the recommendation for future research set forth in the previous three manuscripts, and relates the three manuscripts to the education field. Before beginning, however, I have been instructed to insert a brief note regarding my connection to t herehe research at hand. The research was motivated by personal experiences relative to the perceived benefits associated with mentoring programs, mentors, and mentees. Having personally experienced the challenges of having learning disabilities, I have benefitted from having a series of formal and informal mentors. What each did for me, in different ways, was life altering. My first experiences with mentored learning were in Canada and later in an international context. For many years I was a stained glass crafts person – I apprenticed in Japan and worked both there and in Italy building and restoring stained glass works. I have also been an entrepreneur and faced related business challenges both here in Canada and in Japan. These facets of my work and personal history weave together the mentorship and cross-cultural aspects of my research efforts.

Relative to this, I am sensitive to the societal dominance commonly offered to "normal learners", much like societal dominance frequently offered to extroverts at the expense of introverted individuals. Education for me has real life consequences both in the context of being a newcomer whose linguistic abilities/cultural knowledge may be compromised and as a person experiencing the challenges of dealing with a learning disability at home in Canada or abroad. Mentoring is the nexus where learners not only actively participate in the

learning of new knowledge, but also where intangible knowledge assets, that are not easily codified into a directed learning approach or formal training, are passed on from the mentor to the mentee.

Relevance of Research

In light of the demographic transition underway, findings from this research may be used to assist in maintaining high organizational quality in a time of human resource transformation, flux and globalization by providing necessary information to improve mentoring programs. As the baby boom generation ages, there will soon be a mass retirement of the leadership population in Canada. Because of this, senior employees will need to pass on their knowledge to the next generation. Correspondingly, there will be an enormous need to guide, counsel and advise this cohort.

In New Brunswick, where this research originates, the demographic trend is the result of decreasing fertility levels and decades of out-migration. The province has a substantial demographic bulge in the 50-65 age group. In 2003 for example, the age of eligibility for retirement benefits in many private pension plans was 55. That cohort of retirees represented the beginning of a rising wave that should reach its peak at about the time the largest birth cohorts (1960 and 1961) hit the median retirement age (about 61) in the early 2020s (MacKenzie & Dryburgh, 2003). This retirement wave will remove a substantial amount of talent and experience from the workforce. If New Brunswick faced this demographic challenge in isolation, it might be easier to adapt to the situation. But this is not the case; most of the developed world faces similar

challenges, despite variations in fertility rates, variable retirement ages, immigration, and other factors. Inherent in this problem is the need to transfer knowledge from senior employees to newly hired and to "high potential" employees.

This ability to transfer knowledge is no less important for entrepreneurs, in particular immigrant entrepreneurs, defined here as those who have resided in the country for fewer than five years. Immigrants are now a significant driving force in creating new businesses and intellectual property, both of which are essential to Canada's economic wellbeing. However, a 2010 Conference Board of Canada study found that the country may be missing out on trade opportunities between Canada and the immigrants' countries of origin by not using new arrivals to their full potential (Downie, 2010). Moreover, immigrants could inject life into Canada's failing innovation performance, augment job growth, expand Canada's trade relations, raise the value of exports, increase the number of patents, and boost foreign direct investment. However, too many face "onerous and unnecessary" obstacles that limit their chances of fully participating in the economy.

In spite of challenges, the number of small businesses owned by recent immigrants to Canada increased by 117% from 2004-2007 (Downie, 2010). This creates an immense human service challenge to respond to the needs of ethnically diverse immigrants. In 2008, Canada received 247,200 permanent migrants, an increase of four percent over the previous year (OECD, 2010). Between 2001 and 2006, Canada admitted 1.1 million immigrants. Based on

available projections, immigrants are expected to account for all net population growth in Canada sometime between 2026 and 2031, and for all labour force growth between 2012 and 2016 (Statistics Canada, 2010).

Presently, one of every five Canadian residents was born outside the country. In the past five years Canada has welcomed almost 1.9 million (1,863,791) new permanent and temporary residents. At the same time (2006 to 2011), the country saw a 5.6% population increase to bring its population to a total of 33.5 million, making it the fastest growing country in the G8. Since 2001, two-thirds of Canada's growth has been due to immigration (Statistics Canada, 2010).

Not surprisingly, small town Canadian neighbourhoods are changing.[1] One only has to make a weekend trip to the grocery store or local market to see that cultural diversity is much more prominent than it was just two or three years ago. Given the small size of our communities in New Brunswick, some question the potential of immigrants to adapt, find a sense of belonging, and ultimately stay.

At the beginning of the twenty-first century, population changes increasingly shape the demographic landscape, influence various aspects of Canadian life, and have implications for lifelong learning. Networks and relationships that result from learning matter in that they are necessary for accessing funds of knowledge inherent in others, knowledge holdings that exists

[1] It was found that immigrant inflows into NB had declined in the late 1990s. Immigrant flows were 798 in 2001, increasing to 1646 in 2006 (Statistics Canada, 2007).

outside of formal institutional learning. Mentoring has taken education beyond formal training to embracing social learning arrangements. This assists learners in capitalizing on the perhaps less important and easier to access explicit knowledge holdings, and the highly valuable, often inaccessible, tacit knowledge holdings.

Summary of Findings and Implications for Mentorship Practices

Paper 1: What is cross-cultural mentoring: An integrative literature analysis and discussion of the term cross-cultural mentoring

The typology presented in this analysis (a) distinguishes among various forms of cross-cultural mentoring delineating the specific claims to the term among researchers and (b) explores the range of phenomena to which it refers. The frequent failure to agree hampers communication about important professional issues, which leads to faulty generalizations or incomplete models and theories. For instance, many authors voiced divergent assumptions regarding not only the "target" or the individual being mentored, but also about the basic composition of the dyad: who is the mentor and who is the mentee? where were they were born and/or raised? and what is their cultural and/or racial background? [2]

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[2] Race vs Culture –The ways in which we personally acquire our own group identities are often complex and cultural traits are entirely learned. Race is determined biologically and refers more to physical traits, as opposed to the cultural traits of ethnicity. A person's race is externally decided and has nothing to do with culture, intellect, ability, or personality. Culture is a system of shared beliefs and values (also known as 'worldviews') that may include a shared geographic

This integrative literature review identified two over-arching types of cross-cultural mentoring research. Cross-cultural mentoring articles are predominately authored by researchers based in the United States (US) and can be categorized as "domestic" race-based inquiries; that is, inquiries into the experiences of American-born individuals who are visible minorities with non-dominant cultural backgrounds, and who are not recent immigrants to the US. Within this category, research often focuses on a limited number of domestic racial groups. In other words, populations born in the US that are predominantly black or African American, Hispanic, and Asian. To a much lesser degree, other visible minority populations are present; domestic race-based mentoring also includes research examining how Western knowledge meets Indigenous knowledge. The pattern changes here, however, as work on this latter subset that incorporates Indigenous participants is also being undertaken in Australia, New Zealand, and Canada (Bulman, & Hayes, 2011; Jones, 2013; Strong, 2013; Thomas, Gray, & McGinty, 2011; Ware, 2013).

If this larger sub-set can be identified as *domestic cross-cultural mentoring,* the second cross-cultural mentoring grouping could be categorized as international, global *or cross-national.* Within this category three types of cross-cultural mentoring research can be demarcated:

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region, language, religion, spirituality, or livelihoods. Ethnicity is based on a group (called an *ethnic group*) that is normally based on similar traits, such as a common language, common heritage, and cultural similarities within the group. Other variables that play a role in ethnicity, though not in all cases, include a geographical connection to a particular place, common foods and diets, and perhaps a common faith.

- That involving foreign exchange students, immigrants, expatriates, or those new to a country;
- That between a mentor and mentee from different countries/cultural/racial backgrounds living in different countries. This scenario can be found in multi-national corporations, for example.
- That of pan-cultural utility, which supplements or supplants the extant mentoring literature, which is predominantly Western/U.S./Anglo.

In sum, cross-cultural mentoring is a new and emerging topic with contradictory reporting that would benefit from a holistic conceptualization and synthesis of the literature to date, leading to a comprehensive and categorized approach to conceptualizing the topic (Torraco, 2005).

There is also the matter of jargon or perhaps semantics. The literature scan identified competing terminologies relative to the term *cross-cultural mentoring*. Not discussed earlier, is perhaps a greater and more foundational issue. Researchers and practitioners alike may not even be employing the correct term. The question becomes "what happens when the experts get it wrong?" and "what happens when incorrect language becomes entrenched?" *Cross-cultural* mentoring is by a large margin the term of choice; however, it may be the wrong term used in the wrong way. The correct term, according to

some, may in fact be *intercultural mentoring*.[3] Cross-cultural means to compare and contrast two cultural groups; *intercultural* refers to what happens when two or more culturally different groups come together, interact and communicate. Intercultural speaks of a symbolic, interpretative, transactional, contextual process, which implies the engagement of culturally different people. Cross-cultural communication, on the other hand, is the study of a particular idea or concept within many cultures in order to compare one culture to another (Lustig & Koester, 2010).

The lack of consistency in the criteria used to define the term causes confusion; it is possible that the mentoring profession may never agree upon a common or delineated use of the term, and the multi-disciplinary use of the term does little to provide clarity. However, rather than impose new definitions, the goal of the current research is to use existing descriptions of the construct to create a snapshot of how current cross-cultural mentoring interactions are understood and to appeal for concise labeling of research efforts. It is incumbent upon researchers to more clearly outline who participants are, where the mentoring is taking place, and to what end.

Although cross-cultural mentoring research has advanced, our understanding of it is marred by inadequate and inconsistent labeling e.g., descriptive key words about the nature of the relationship and characteristics of

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[3] In repeating the literature scan using the same data bases as above and using the term *intercultural mentoring* SCOPUS and the Web of Science each brought up the same single article, Digital Dissertations delivered 2 dissertations.

the relationship. This is a problem for the field; key word listings were unclear and imprecise in more than half of the articles collected. Correspondingly, researchers need to more clearly classify how samples differ. Readers, for instance, should not have to read well beyond the abstract in order to arrive at an understanding of who the mentees and mentors were, where they were from and exactly what type of mentoring is being discussed. Until such gaps are minimized and even closed, cross-cultural mentoring research will remain intriguing, but fragmented.

Paper 2: What do newcomers value in cross-cultural mentoring relationships?

Mentoring is less and less a race-free or culture-free endeavour. In light of the ongoing move toward economic globalization, immigration trends and workforce diversity, this research has the potential to provide valuable information not only to cross-cultural mentoring for newcomer or immigrant entrepreneurs, but also for cross-cultural youth and faculty-student mentoring programs, as well as expatriate mentoring efforts. Study results may also be used to inform policy and practice relative to new destination immigrant entrepreneurs. Multicultural curriculum developers can also capitalize on this research to support business immigrants in efforts to mobilize resources and social networks to improve their outcomes. Further to this, understanding the effects of race and ethnicity on mentoring in the context of adult education is crucial to the development of human resource potential.

Interviews highlighted the unique characteristics of mentoring in cross-cultural contexts, including participants' conception of mentoring, expanding the two functions traditionally used in mentoring studies (career versus psychosocial) to include role-modeling; mentor as guide; the importance of cross-cultural transition support; career/business implications; and the dominance of psychosocial support. This research paper began with the question of how immigrant mentees perceived the diverse meanings of cross-cultural mentoring and what skills and/or competencies were required of the mentor or mentee. The results of this study led to several recommendations for mentors, mentees and program coordinators to enhance cross-cultural mentoring.

Cohorts within the study enhanced the quality of developmental interaction by employing computer-mediated communication (CMC). Given the expressed importance of the utilization of technology, mentor participants need to be prepared to employ such options. CMC allows for the development of interpersonal relationships and has had an important effect on the mentor's and mentee's ability to deepen the relationship. Cross-cultural mentoring training should look to emerging research related to mentoring in a virtual context (Ensher, Heun, & Blanchard, 2003; Shpigelman, Weiss, & Reiter, 2009).

Interview results indicated that cultural understanding as an aggregate was addressed in cross-cultural training, but tools to *drilldown* to specific cultural and/or ethnic levels were lacking. Correspondingly, training content should guide participants in their effort to understand the influence of specific cultures

and ethnicities. Although there is little empirical evidence regarding the role of culture in mentoring (Chi-Ying Chung, Bemark, & Talleyrand, 2007), there are several models that could assist with understanding the dynamics that may be present during cross-cultural mentoring. For example, the National Cultural Dimensions theory or Hofstede's theory (2001) provides benchmarks for the discussion of national cultures/value; each is a group level assessment and should not be viewed as a rigidly prescribed set of behaviours or characteristics. Not every single individual from even the most circumscribed or strict culture may display any or all of the features commonly associated with it. Every person is, after all, an individual, and individual differences do persist. More specifically, as the relationship evolves mentors and mentees can move forward, validating and invalidating cultural assumptions. The importance of this should never be underestimated since communicational misunderstandings can potentially lead to dire consequences.

Networking is a learned skill and the nuances vary greatly from country to country. To take advantage of the mentor's network and other introductions facilitated by the respective programs, mentees must be able to network. This study provides evidence that, while mentees may say and sincerely believe that networking is essential to business development, preliminary research indicates that mentors may have to validate and "assumption hunt" to ensure that mentees grasp the social norms and skills that are required. Mentors need to be prepared to find out how effective the mentees are at framing their business. How refined is their approach? Are they comfortable asking questions such as:

"What do you do?", "Tell me about your business?", "What do you like most about the business you're in?", " What do you like least?", "Where are you from?", or "What is the perfect client for you?" Are they ready to field questions and to describe the key benefits of their business? For example, could they speak to sales objectives, and target demographics? In addition to networking, mentees also highlighted the importance of conversations that identified business possibilities, revealed aspirations, and explored doubts, as all entrepreneurs experience periods of doubt during which they consider the possibility of abandoning their business aspirations (St-Jean, 2009; Valéau, 2006).

To this end, a contribution of this research is the expansion of mentoring research into the cross-cultural/inter-cultural arena, as well as the extrapolation of promising practices. For instance, found within the five themes, there appear to be key qualities and practices that these study participants employed, including challenging assumptions, remaining open, increasing cultural awareness of self and others, coping with ambiguity, and using a multiplicity of communication styles, each of which would be important to include in mentorship training.

Paper 3: Corporate mentorship programing: Promising program practices for "fast-tracking" high potential employees

This process evaluation involved the review of existing mentoring programs at XYZ Corporation (XYZ) to examine the consistency of program implementation; identify implementation challenges, accomplishments and

solutions; identify essential mentoring content and approaches; and investigate mentoring processes and their impacts. Such evaluation activities make it possible to identify the strengths and challenges that influence a program's success. This evaluation focused on the programs' written objectives, implementation activities and outcomes. The review utilized records from existing program processes, insights gathered through meetings with staff members and data collected from program participants to synthesize information about program implementation and to evaluate process objectives. This process evaluation produced results that corroborate the findings of a great deal of the previous work in this field.

One of the issues that emerge from these findings is the often-understandable confusion between *coaching* and *mentoring*. In spite of sharing many similarities and a common focus on growth and advancement, there are differences. Coaching, for example, is primarily concerned with skill development and the development of self-knowledge. Coaches are generally not subject matter experts, but rather experts on how people change. Within the business world, coaches have formal training and are paid for their services (D'Abate, Eddy & Tannenbaum, 2003).

In contrast, mentors have experience to share with the mentee in the career, field, profession or job they share; it is the mentor's professional and/or workplace knowledge, expertise and network that give mentoring its distinctive character. Unlike a teacher or coach who is focused on a particular set of skills, a mentor is a guide. This definition allows for the possibility that a mentor may

be younger than a mentee. The 21st century model has moved beyond the limitations of the traditional mentoring structure – one hierarchical in nature – to one that is more egalitarian, and based on equity rather than equality. In other words, both parties are stakeholders and accordingly, both parties have equity in the relationship (Eby, Rhodes, & Allen, 2007). Mentoring is a transactional relationship grounded in learning; in this case, adult learning. The mentor is a facilitator of knowledge who assists in bringing clarity regarding the mentee's own aspirations for improvement, helping each mentee diagnose the gap between aspiration and present level of performance, and though not mentioned in the research, in such terms, economic guidance is not infrequently an outcome of the relationship. There is, however, more to mentoring than its definition.

What distinguishes this dyadic relationship from others is that in mentoring, the primary motive is to do with the transfer of knowledge, skills, values and psychosocial support. In sum, it is a special type of developmental relationship that is mutually beneficial for both parties as it evolves, and includes a range of career and psychosocial functions.

As coaching differs from mentoring so too does learning from teaching. Traditional educational models do not teach learners to be self-directed; most often, learners have been conditioned to be dependent on teachers to teach them. The results of the process evaluation indicated some effort may be required to shift this erroneous perception and manage any "culture-shock," especially, if this is the mentor's and/or the mentee's first exposure to mentoring

and transactional education. Such a model requires the student, or in this case the mentee, to be front and center in the planning and evaluation of their own learning.

Correspondingly, both mentors and mentees provided specific recommendation for improving formal mentoring programs. Some participants noted that the program might benefit from additional print collateral and reference material to further support the operationalization of the mentoring process, and enhanced and/or additional training. The process evaluation results agree with research reported by Hazlet and Gibson (2005) who declared that readiness for mentoring, pre-service training and ongoing training correlate to not only the effectiveness of the program but also the mentoring provided. Training should also address relationship management for example, structuring frank discussions about the limits and boundaries of the mentoring relationship, instructions regarding relationship breakdown and the role of the coordinator. Relationship management defines the lines of authority, clarifying overlapping roles and responsibilities, and limits the potential for role confusion and permits the dyad to come to a mutually agreed upon working concept of the mentoring relationship.

Drilling-down, Fast-Trak participants suggested that the program mission, vision, goals and activities be more clearly articulated and their progress benchmarked, as there was some confusion about how to progress through the Fast-Trak program. Further to this, regular status reports, exit evaluations and end of program evaluations were deemed as missed opportunities for ongoing

professional development that could provided opportunities for both parties to learn from a retrospective examination of the mentorship experience. Acquiring such data would also support program development.

Meeting management was also considered critical to program success. Participants deemed regular meetings as integral to successful mentoring experiences. Participants noted the role of mentors in the provision of orientation to the company's culture and processes. Regular information sharing is fundamental to a successful mentoring relationship. Participants spoke of meeting efficacy and their desire to move beyond a problem-driven mentoring approach to one that was focused on cultivating leaders, and that provided support tools such as conversation starters, the mentor's biography, a summary of XYZ's leadership criteria, and a catalogue of professional development or learning opportunities designated as important to XYZ.

Moreover, as mentoring is solidly embedded in learning, a personal development plan would be instrumental in ensuring that the relationship is focused on meeting mentees' learning goals and objectives, providing a structure of systemizing learning. The creation of an action plan ensures, on the part of the mentee, that a high degree of responsibility is taken not only for learning, but also for the co-creation of a systematic procedure for evaluating learning outcomes. Together, the mentor and mentee appraise what collection of evidence needs to be in place to determine whether desired changes took place.

It is impossible for one mentor to meet all of the mentee's needs. Within the personal development plan there should be space to generate a list of learning opportunities both within XYZ and outside the company that can offer exposure to other role models, advisors, and mentors; and opportunities that can offer new learning, reinforce new learning, and accelerate learning; experience is the richest source for adult learning. The personal development plan should prompt the mentee not only to articulate his/her vision and goals but also to analyze what gaps exit between their vision and their current competency. During this process, "soft-issues," such as the kind of support the mentee requires and what assistance the mentee sees as most useful and the learning styles/preferences of both the mentor and mentee should be discussed. It is important for both parties to know how the other works best; is it from doing, watching, listening, or from experimenting with new knowledge and subjects?

It is recommended that program documentation remind mentors that their role is to engage in a process of mutual inquiry with the mentee, rather than a relationship that merely transmits knowledge and measures conformity to it. Mentees may need guidance and empathy in coping with multiple points of view, making wrong decisions, and dealing with uncertainties.

It was suggested that, upon matching of dyads, the immediate scheduling of appointments for the first few meetings might ensure an effective start to mentoring relationships and later that program coordinators periodically check on the progress for the mentoring relationships to ensure mentees and mentors are fulfilling their obligations to meet the expectations of the program. Further

to this point, most mentees were unaware of specific guidelines and practices related to mentor recruitment, or of the qualities being sought by the company in perspective mentors and were interested in knowing more about the process.

While information exchange has occurred as stated by the mentees and mentors, the recommendation is to consider that the generations represented in the workforce may require different ways of communicating and transferring knowledge. Previous mentors and mentees should be engaged to share information on how the mentoring program helped them in their career development and professional development.

The results of the data analysis indicated that mentees experienced growth in a variety of areas, including: career advancement, self-confidence, enhanced interpersonal skills, managing interpersonal relationships, strategic thinking and complex problem solving strategies. The analysis indicated that the mentoring programs are beneficial, and mentors and mentees agreed that employees who participated in mentoring programs are more competent. Even participant employees' with concerns or who rated the program poorly were still clearly invested and committed to the mentoring process expressing strong support for efforts to strengthen and further incorporate mentoring into the company's educational and professional development strategies. All mentee participants felt an especially strong obligation to strengthen programs for the benefit of future participants, and most expressed interest in becoming mentors in the future.

The results of the data analysis indicated a rather large gap when mentee participants were asked about over all satisfaction. Mentees in the Mentorship Program for Business Professionals indicated overall satisfaction at 83% where as Fast-Trak mentees rated there over all satisfaction at 54%. While other factors were relatively positive, participant perceptions in this regard provide valuable insights in the ongoing development of program structure, communications and processes. Notably, few participants reported problems related to working with their mentor, which may be indicative of the quality of individuals involved in the dyads and the joint commitment to professional development within the dyad.

These findings with research results from past scholars support the notion that mentees and mentors benefit from participation in mentoring programs, and mentees and mentors experience personal, professional and leadership development. Effective mentoring programs provide an opportunity for planned supportive mentoring relationships to develop personal and professional growth, and with planned exposure to new insights and perspectives for employees to gain leadership experience (Eby et al., 2007). Mentoring programs are effective when management support, appropriate program structure and information exchange occurs to assist employees in their effort to learn about the organization and the organizational culture, and to build networks and navigation skills.

Relevance of Manuscripts to Lifelong Learning via mentoring

Organizations consistently struggle to preserve expertise and knowledge. However, due to the ensuing retirement of the baby boomer generation this pressure has been exacerbated; organization "thought leaders" may leave without recording and/ or transferring their valuable knowledge for current and future employees. Already, corporations have noticed that retiring experts have tacit knowledge holdings that are difficult to codify and share.[7]

There is agreement that *knowledge transfer*, coined by Polanyi (1966) cannot be easily defined or applied; nor can the nature of transfer, the extent to which it occurs, and the nature of its underlying mechanisms and the intent to apply it (Lobato, 2008; Yelon, Sheppard, Sleight, & Ford, 2008). As Polanyi (1966) put it, "we know more than we can tell (p.4)." Tacit knowledge is not public and it is not easily accessible, not surprisingly, rendering intuitive "know-how," and embodying observations, distinctions, feelings, perceptual patterns and nuances into words often proves elusive (Cheng & Hampson, 2008).

Despite research efforts, current workplace conditions pose the greatest challenges for knowledge transfer research (Salas, Milhan & Bowers (2003) in Baldwin, Blume, & Ford, 2009; Ford & Yelon, 1999). This is due in great part to the intersection of two newer dimensions of work - the quadrant where skills are open; in other words, not simple motor skills, and the fact that employees are

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[7] Knowledge can either be explicit or tacit. Explicit knowledge is different than tacit, which is difficult to articulate in that it can be verbalized and in this context captured in the form of text, tables, diagrams or maps.

increasingly self-governing workers or autonomous professionals. Correspondingly, such individuals are a group generally ignored in transfer research (Yelon, et al., 2008).

Blume, Ford, Baldwin and Huang (2010) concur, adding that there is a need not only to know which predictors actually make a difference in facilitating transfer in the workplace — not just intuitively or anecdotally, but also to identify which predictors actually make a difference in facilitating transfer. This is equally important for seasoned entrepreneurs endeavouring to impart knowledge holdings to new immigrant entrepreneurs. Tacit knowledge sharing requires methods that are based on social interaction; accordingly different methods are necessary in order to make tacit knowledge more explicit and to leverage it. According to Bloom's Taxonomy of Learning, transfer of learning must be viewed as fundamental to the overall learning process, and is foundational for the success for the total learning experience (Thomas, 2007). Bloom's Taxonomy is a tiered model that classifies thinking according to six levels of cognitive complexity: remembering; understanding; applying; analyzing; evaluating; and creating. This hierarchical framework requires the achievement of each prior skill or ability before the next can be mastered. The accurate measurement of learning requires a classification of levels of intellectual behaviour important in learning (Thomas, 2007).

Given the above, the transfer of learning is a critical variable in research conducted in corporate settings, as the goal of "training" is not only to enhance work performance but also to increase the likelihood of program replication. In

light of this, the Baldwin and Ford (1988) transfer model and the conceptual model of Holton, Bates, and Ruona (2000) are the most commonly cited and used in transfer studies (Lim & Morris, 2006). Consequently, Baldwin, Blume and Ford (2010), in an update of Baldwin and Ford's (1988) comprehensive review of transfer of learning, cite three areas in need of research, one of which highlights individual-level factors and the need to explore the "personalization" of knowledge transfer in an effort to enhance its transference.

But what kind of education and training will produce just-in-time knowledge transfer in the workplace? And what kind of educational experience will offer bi-directional spinoffs? Mentoring is one well-cited option. It is a collaborative way of creating knowledge and solving problems. In sum, the learner increasingly becomes an active member of a professional community, knowing not only how to locate appropriate explicit knowledge but also how to locate appropriate knowledge in human form and apply it in one's work.

Tacit knowledge is the knowledge required to do something — and it is most often learned through direct observation, conversation, or teaching. Within a general business framework, tacit knowledge is needed to solve problems of medium to high complexity and these problems usually require more experienced professionals to provide guidance and know-how (Connect, 2009). It is this tacit, experience-based knowledge that teaches how to apply principles to specific types of problems for the most favourable outcome.

Knowledge transfer/personal learning within this framework can be understood as context-dependent and as a resource created by actors working

together – learning within a dyad does not just exist; it is created through interaction between actors and the contexts in which they act. In this milieu, learning is the result of social interactions and context.

The knowledge transfer process within the mentor and protégé dyad has not been examined thoroughly despite its importance to adult education, human resource development, increased understanding of mentoring, mentor training, and program duplication (Egan, 2005; Henriques & Curado, 2009; Hezlett & Gibson, 2005; Lankau & Scandura, 2002; Lankau & Scandura, 2007; Wanberg, Welsh, & Hezlett, 2003). A challenge for directors of formal mentoring programs is understanding how to facilitate knowledge transfer and create the greatest likelihood of success for mentoring dyads (Egan, 2005). Correspondingly, it is hoped that this research will offer pragmatic guidelines and suggestions that will help both mentors and mentees, and organizations improve mentoring functions and consequently improve the ability of stakeholders to maximize their available in-house talent (Connect, 2009).

The notion that each individual protégé and mentor, has unique personal knowledge holdings that they can contribute to the mentoring relationship, and that perceived relationship success is impacted by this knowledge transfer, is not new (Allen & Eby, 2003; Hale, 2000; Henriques & Curado, 2009). Overall, research to date supports the proposition that mentoring enhances protégés' cognitive, skill-based, and affective learning, as well as their social network development (Kraiger, Ford, & Salas, 1993; Lankau & Scandura, 2002; Wanberg, et al., 2003).

However, exploration of these dynamics has been limited and little research exits to confirm these assertions (Hezlett, 2005; Kraiger, et al., 1993; Lankau & Scandura, 2002; Wanberg, et al., 2003; Yang, 2004). Despite wide recognition of the inherent significance of learning in mentoring, little research exists to confirm these assertions and there appears to be a paucity of research that explicitly examines the learning process in mentoring. Moreover, learning is only tangentially considered, and minimal literature currently draws links between mentoring and specific learning theory (Henriques & Curado, 2009).

Some evidence suggests that through work place mentoring relationships, protégés gain at least two kinds of knowledge – organizational knowledge and technical knowledge. In addition, protégés develop various skills, including technical, interpersonal, time management, and self-organization skills; and experience affective changes, particularly in the area of self-confidence (eg., Bard & Moore, 2000; Chao, Walz, & Gardner, 1992; Dymock, 1999; Hezlett, 2005; Ostroff & Kozlowski, 1993).

What contributes to an individual's ability to extract benefits? Although the literature finds that mentoring leads to a number of aforementioned positive outcomes, the literature lacks clear explanations of what is important in the creation of knowledge exchange within the mentor relationship. Prior research suggests that it may be the amount of time individuals spend together (Coleman, 1988), their social class difference (Gaddis, 2011), the level of trust between individuals (Coleman 1988), their racial similarity (Thomas, 2001), or intergenerational closure (Coleman 1988).

It cannot, however, be assumed that the process of sharing tacit knowledge holdings will be easy or spontaneous. However, contributions by research participants have offered clues on how to further tease out and thus develop communication strategies and/or communicative tasks for mentors who find themselves in situations where they know-that-they-know but are unable to articulate their knowledge.

Mentoring has been a part of advanced training ever since Odysseus charged Mentor to teach his son. It is an important means of facilitating learning in our society. Correspondingly, it can be concluded that the need for knowledge transfer will grow and the way in which it occurs will continue to shift to reflect the growing importance that technology and social learning for adults with lifelong learning requirements. In turn, increasing the relevance of research examining how mentors and mentees manage knowledge exchange, investigating knowledge sharing methods and studying the codifying of implicit knowledge.

The development of useful tools and measures that specifically increase the learning that occurs during adult dyadic learning relationships will enhance practice in the field by determining what organizations need to know regarding mentoring in order to improve program performance in the 21st century.

Limitations

The difficulty and complexity of today's business issues often require that research methods capture the rich, nuanced, varied, and sophisticated personal feedback of individual cases or small scale analysis; however, cognitive

psychologists and other academics have warned that self-reported data is fallible (Nisbett & Wilson, 1977). Others argued that the so-called poor quality of self-reported data is nothing more than an "urban legend" (Chan, 2009; White, 1980). White and others challenged the rigor of Nisbett and Wilson's theoretical position for making unwarranted assumptions (McClure, 1983; White, 1980).

Memory data, self-reported data, or the insider's perspectives have long been crucial elements of humanities and social science research. Self-reported data are essential to behavioural and medical research, and among historians, for example, memory is considered a methodological tool (Keightley, 2010; Roth & Kleiner, 1997). For social history and oral history, self-reported data have made the illiterate literate, have given the silent masses a voice and have offered contextualization to raw data (Keightley, 2010). Most qualitative researchers would argue that validity is one of the strengths of qualitative research because it is possible to ask research participants what they mean and check to see that both researchers and participants understand questions, answers, and terminology the same way; whereas survey administration assumes that the respondents share the same definitions as researchers. Moreover, qualitative interviews can help explain and enhance quantitative findings. The relevance of self-report is no less true in this proposed study. According to Keightley (2010), the analysis of self-reported data involves looking for themes arising from the accounts, and identifying recurring commonalities in the form or content of the experiences. Therefore, reliance on participants'

memory of specific details related to daily or weekly mentoring activities was minimized.

Two of the studies included within this dissertation explored mentored learning within the context of formal mentoring programs established to develop potential by providing support and learning to address identified knowledge gaps. A qualitative research approach utilizing qualitative design in conjunction with descriptive statistics was employed to determine the predictors of successful mentoring, defined as learner satisfaction.

Allen et al.'s (2008) comprehensive review of mentoring research emphasizes the importance of context, noting that qualitative research on mentoring has substantial utility in helping us understand the potential of mentoring. It provides a forum enabling participants to say, in their own words, what matters to them and why. Qualitative research methodologies result in a meaningful, actionable understanding of participants' needs and expectations.

According to Maxwell (2005), the intent of validity in research is focused on the integrity of the data, the researcher's reporting of the data, and researcher bias. Maxwell (1992) identified five categories of validity that pertain to qualitative research: descriptive validity, interpretive validity, theoretical validity, generalizability, and evaluative validity. Such efforts have not, however, quelled the controversy over the existence of validity in qualitative research. All the same, since the variables under study are attitudinal, it is necessary to utilize self-reported data; validity still exists, but in a different manner than in quantitative research.

Other concerns regarding qualitative research include credibility, transferability, dependability, and confirmability. To counter the challenges related to retrospective self-reporting and memory, and to limit the concerns of the study's use of self-reported measures (which raises the possibility that common source method variance may produce inflated or irregular correlations), additional sources - the mentors/mentees, the program coordinator and the instructional designer - were interviewed, providing greater accuracy than would any single source (Lankau & Scandura, 2002). Differences in the nature or magnitude of discrepancies between the data sources can be assessed and recorded.

Qualitative threats to validity also include the post hoc fallacy, which is when an effect is observed and the event preceding it is claimed to be the actual cause; in other words, *A* occurred, then *B* occurred; therefore, *A* caused *B*. In the case of this analysis, this would mean that the learning deemed to be a result of the dyadic interaction may have actually come from a separate mitigating cause. However, in process evaluation, no causal relationships are assumed.

In summary, obtaining information from multiple data sources increased the validity of the research. The achievement of method triangulation included an extensive literature review, data collection through a Likert survey and open-ended questionnaires, and one-on-one interviews. The aforementioned strategies can ensure that the epistemological challenges memory poses are met.

Assumptions

Within the parameters of this study I have made several assumptions. I assumed that I would find willing participants because the nature of the research would provide a personalized professional development opportunity. Additionally, my research question is framed within the anticipation of the participants describing both successful and disappointing experiences concerning mentoring; however, my bias assumes that the mentoring is essentially successful.

In conjunction with this belief, I needed to continually self-monitor to ensure any personal biases in regard to the research did not become evident or explicitly identified. Correspondingly, I was conscious of not excluding comments that do not adhere to my perceptions. Conversely, I had to be equally wary of blindly accepting opinions simply because they match my own beliefs. I recognize that as an instrument of the research, my subjectivity cannot be entirely eliminated from the work; it is therefore important that I describe my reflexivity as both a limitation and an assumption of the two qualitative studies I undertook (Collingwood, 1964; Creswell, 2003; Yin, 2003). Furthermore, I had to remember that the study was informative, but not necessarily generalizable to all mentoring programs and mentor/mentee experiences. The patterns and themes presented within this research cannot translate into an all-knowing list of characteristics and facts. The purpose of this research was to expand upon the experiences of participants, and the two programs in general in order that the programs can continue to improve and that mentors and mentees might be

provided with new strategies to increase professional growth within the parameters of a formal business mentoring program. Finally, I assumed that the research would be worthwhile; that is, that the data would reveal themes and insights that I could not have foreseen.

Direction for Future Research

Paper 1: What is cross-cultural mentoring: An integrative literature analysis and discussion of the term cross-cultural mentoring

The increasing interconnectedness of global and domestic organizations suggests that the need for cross-cultural mentoring research will be increasing, not decreasing due to the twenty-first century climate of migration. Traditionally, adult mentoring has been about developing talent. In the future, this will expand to include the excluded. Attributable to this new climate, cross-cultural mentoring research will advance further examination of gender/sexual orientation/sexuality (Wilkinson, 2007), age, religion, physical ability/ability status, corporate/institutional culture and other aspects of difference in efforts to value and embrace diversity. Therefore, generalizations regarding the term need to be used cautiously.

To this end, the interconnectedness of global and domestic organizational requirements suggests that the need for cross-cultural mentoring will be increasing, not decreasing, if the profession can deliver culturally responsive programs and research. Given the growing climate for cross-cultural mentoring, I speculate that the future trends in this area include the following:

- Cross-cultural approaches will grow in their influence on the design and implementation of mentoring initiatives.
- Multicultural teams will be targets for cross-cultural mentoring programing.
- Cross-cultural mentoring will gain acceptance as a precursor or substitute for "general mentoring," especially in global corporations.
- The importance of diversity will increase the demand for cross-cultural mentoring.
- The importance of culturally related communication styles on productivity and teamwork will increase the demand for cross-cultural mentoring.
- Organizations will demand new strategies and instruments to expand and buttress best practices related to cross-cultural mentoring.
- Cultural diversity will increasingly be included in the criteria for the selection of corporate mentors, replacing the current trend toward assigning this role to white males.
- Cross-cultural mentoring will become the strategy of choice to share the concepts, attitudes, and skills necessary for effective cross-cultural interactions.

In conclusion, a key challenge for research on mentoring is to move beyond the faulty assumption that the experience of race or culture does not

shape, alter or drive the mentoring relationship. It is inappropriate to assume that the experiences of one group adequately and accurately reflect the experiences of other groups.

Paper 2: What do newcomers value in cross-cultural mentoring relationships?

This research should be treated as a limited first step into this type of analysis. Self-reporting and retrospective sense-making may suffer from hindsight bias and/or attribution bias. A longitudinal study that includes mentors is necessary to examine relationship dynamics through different stages. Additional areas of future research are also suggested by lessons learned. Like most research on cross-cultural mentoring, this study was cross-sectional, and thus could not examine the mentoring process as it unfolded over time. While acknowledging the difficulties in conducting longitudinal research, it would be advised that studying the mentoring process as it develops over the course of the program would enhance the understanding of how mentoring influences the effectiveness of individuals mentoring across cultures. Such longitudinal research would enable scholars to examine not only the effects of the mentoring program, but also how these mentoring relationships may change over time – from initial acceptance of the relationship to its formal conclusion. Longitudinal studies of the different types of support that respective mentors provide (e.g., focus on task *vs* entrepreneurial support *vs* psychological support), mentor/protégé frequency, intensity, and effectiveness of communication, and

how mentor/protégé communications may affect the knowledge transfer process, would greatly enhance the research on cross-cultural mentoring.

The formation of social capital or the web or network of social relationships that influences individual behaviour and thereby affects economic growth is essential (Brenner, Menzies, Dionne, & Filion, 2010). Correspondingly, this research also considers whether and in what ways elements like trust and a sense of bounded solidarity are associated with improved business opportunities. New destinations meet neither the requirements for an ethnic enclave nor the preconditions for bounded solidarity. Instead, other ways of obtaining strategic alliances become important, in particular relationships characterized by trust. Immigrant entrepreneurs in smaller Canadian destinations need to develop community ties for immigrant business success (Salaff, Greve, & Siu-Lun Wong, 2006).

Portes (1998) argue that it is this awareness of shared membership that is essential to the development of social capital for immigrants. The question then becomes: How can a network identity be created for business immigrants in new destination communities? Mentoring programs are being launched throughout the country in an attempt to achieve that. As suggested by social identity theory, a shared identity like that created through a business network can develop trust between members and redefine self-interest to consider the group as a whole (Besser & Miller, 2011). Trust further encourages benefits through promoting resource exchanges (Besser & Miller, 2011), cost sharing, information sharing, risk sharing, shared IT knowledge and overall increased

network resource access (BarNir & Smith, 2002). People then choose intercultural personhood to gain access to benefits (Kim, 2006, 2009). Can trust be found to be related to increased perceptions of business benefits, increased resource exchanges, and network sustainability?

Paper 3: Corporate mentorship programing: Promising program practices for "fast-tracking" high potential employees

The review of literature indicated some areas that the existing body of literature on mentoring, mentoring programing and the day-to-day interpersonal processes involved in mentoring do not include. Therefore, the following research areas could include further research on mentoring program tools, mentoring program structure and the impact mentoring programs have on participants and organizational performance. Addressing these issues would contribute to theory-building and help improve practices related to mentoring. In sum, many issues remain for future research.

There are limited studies that examine mentoring program effectiveness, mentor/mentee commitment and motivation, and program understanding as mediating mechanisms. Additional questions include whether receipt of training predicts expectations or if higher quality training leads to cognitive, affective and behavioural processes. Program characteristics are also under studied. For example, the Business Mentoring Program for MBA's has recently added a peer-mentoring component. Given that, there may be a link between program features and perceived effectiveness.

Another issue for future research is the examination of stakeholders' perspectives of effectiveness, such as mentees' immediate supervisors, upper management and human resource manages. Job attitudes before and after the mentoring program, with a control group included, would be useful in understanding program outcomes, as would exploring the different factors mentors and mentees consider in determining the effectiveness of a formal mentoring program across a programs' duration.

More research evaluating the impact of mentoring at the organizational level would help clarify the possible objectives mentoring could be used to support. Additional areas worthy of research consideration include mentoring as it relates to: employee recruitment and retention, cultural assimilation and adaptation of new hires, organizational outcomes, the promotion of equity and diversity in the organization and whether formal mentoring increases rates of informal mentoring. Alone or in combination, these areas would add important insights of our understanding of formal mentoring in the work place.

Conclusion

In light of the ongoing move toward economic globalization, immigration trends and workforce diversity, this research should be of interest to provincial policy makers, who look to immigration as a way to boost the economy and see it as a potential long-term solution to population decline. There is also further need to look to potential solutions to the problems that can be expected due to the retirement wave of the baby boomer generation. This retirement wave will eliminate a substantial amount of talent and experience from the workforce.

Inherent in this problem is the need to transfer knowledge from senior employees to newly hired and to "high potential" employees. In sum, the ability to transfer knowledge is equally important for both efforts – immigrant entrepreneurs and newly hired and "high potential" employees. The results of these research studies have potential to provide valuable information not only for "traditional" same race/culture mentoring relationships, but also for immigrant and expatriate mentoring efforts, as well as for cross-cultural youth and faculty-student mentoring programs.

The higher education market, for instance, is continuously growing; however, so also is the market's competitiveness. According to *The Economist* (2008), globally more than three million students are now studying outside of their home country. This is representative of a 50% increase over 2000 figures. Many of the students pursuing educational options in another country are from countries with insufficient capacity to accommodate the number of students interested in pursuing higher education. The opportunities to attract this influx of students have been aggressively pursued by many countries. Ergo, an effective mentoring program for such students becomes more important within the constellation of recruitment and retention offerings extoled by universities in efforts to buttress falling domestic enrolment numbers. By extension there will be increased pressures on work place mentoring if retention and naturalization is indeed a policy priority of governments and business.

Also, this research complements one of ten research themes identified in *The Current State of Multiculturalism in Canada and the Research Themes on*

Canadian Multiculturalism 2008-2010, as well as goals outlined by Citizenship and Immigration Canada. This work may be used to inform policy and practice relative to new destination immigrant entrepreneurs. Multicultural curriculum developers can also capitalize on this research to support business immigrants in efforts to mobilize resources and social networks to improve their outcomes.

While economic concerns are important to address, there is also evidence for the need to investigate social and cultural dis-juncture (Ward, Bochner, & Furnham, 2001). Existing scholarship predicts that immigrants least involved in structured groups and/or organizations were those most likely to move out of the region. Movers participated in roughly half as many different types of groups or organizations (45%) as compared to stayers (81%) (Ramos & Yoshida, 2011). Those who feel isolated and lack a sense of belonging are most at risk of leaving; mentoring has the potential to combat this.

Portes and Dewind (2004) argue that it is this awareness of shared membership that is essential to the development of social capital for newcomers. Hence, for immigrants, mentoring relationships can be particularly critical in terms of facilitating integration as well as encouraging persistence. Business networks can develop trust among members and redefine self-interest to consider the group as a whole (Roccas & Brewer, 2002). Members may then choose to expand their identity to gain access to benefits (Roccas & Brewer, 2002). The development of trust within and among networks further encourages access to benefits through the promotion of resource exchanges (Besser & Miller, 2011). Business mentorship programs are

considered a key component of the solution to these obstacles. Indeed, Light (2004) claims that the contribution of social networks to entrepreneurship is the most important research discovery in the last generation.

There is also increased interest in examining dimensions of new destinations (Griffith, 2008; Lochhead, 2005; Woolcock, 2001). Research typically ascribes to one of two dominant perspectives: to track and explain new resident population trends and pattern shifts (Anthias, 2006; Donato, Tolbert C., & Y., 2006) or to examine economic forces that either draw immigrants to specific areas, or result in employer failure to adequately support new immigrants (Griffith, 2008; Lochhead, 2005). Both foci concentrate on new destination immigrants as workers, resulting in a dominant view of immigrants as primarily a labour supply rather than as entrepreneurs (Zarrugh, 2007). This literature expands this discussion, but much of what is known about immigrant business success, however, has evolved from research on ethnic entrepreneurs embedded in ethnic enclaves. Here entrepreneurs are able to draw on ties to co-ethnics to achieve advantages resulting from social capital, which is developed by several means in enclaves including a sense of "we-ness" created through a common ethnicity.

Like cross-cultural mentoring, the signs are that work place mentoring will continue to grow. It will be focused around clearer goals for both members of the dyad and their employer, and organized with a closer proximity to the commitment and professionalism the organizations would apply to their core work and mission. Through mentoring, organizations will further grow and

nurture their people, retain hard earned experience and wisdom. Organizations will reap improvements in efficiency, productive and innovation and enjoy long-term benefits as employees become more self-directed and develop stronger communication and problem-solving skills

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Appendices

Appendix A

Paper 1: What is cross-cultural mentoring? An integrative literature review and discussion of the term cross-cultural mentoring

Concept Matrix and Units of Analysis

Article Name	Author(s)	Journal	Year	Key Terms Listed	Clarity of Title, Key Terms, Abstract (Y/N)	Concepts										Notes
						Level of Analysis			Demographics			Type of Cross-Cultural Mentoring				
						Group	Dyad	Individuals	Youth	Post-Secondary	Adult	Domestic/Race (Anglo/US)	International/ Global/Expatriate	New Immigrant/ International Student	Pan Cultural Utility	

EBSCO Host to search CINAHL, Eric, Business Source Primer, PsycINFO, and Academic Search Premier. To search TERMS (cross-cultural OR cross-ethnic OR cross-race AND mentoring)

SCOPUS to search TITLE-ABS-KEY (cross-cultural OR cross-ethnic OR cross-race) AND KEY (mentoring)

Web of Science to search Topic=(cross-cultural OR cross-ethnic OR cross-race) AND Title=(mentoring)

International Journal of Mentoring and Coaching in Education. To search KEY WORD (cross-cultural mentoring)

Mentoring & Tutoring: Partnership in Learning. To search KEY WORDS (cross-cultural mentoring)

Digital Dissertations. To search KEY WORDS (cross-cultural mentoring and intercultural mentoring)

Google Scholar. To search KEY WORDS (cross-cultural mentoring)

Appendix B

Paper 2: What do newcomers value in cross-cultural mentoring relationships?

Research Information Form

MENTORSHIP EVALUATION PROJECT

Immigration Inc.: Immigrant Entrepreneur Mentorship Programs in New Destination Communities and Model Effectiveness

This project is on file with the UNB Research Ethics Board as 2011-087

Researchers:
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For additional information regarding this research, potential participants may contact Dr. Patricia Peterson, Co-Executive Director, Health and Education Research Group, Faculty of Education, University of New Brunswick, plp@unb.ca, (506) 458-7187 or Dr. Ann Sherman, Dean of Education, University of New Brunswick, (506) 453-4862, shermana@unb.ca.

Purpose of the Research

The purpose of this research project is twofold. First, data collected and the research outcomes will contribute to the researchers' PhD thesis and publication efforts regarding acculturation and personal learning/knowledge transfer between mentees and mentors (the dyad). Formal mentorship programs are important mechanisms serving functions including **psychosocial,** interpersonal and the less researched acculturation and personal learning/knowledge transfer function. Many in the human resource development (HRD) field view such mentoring programs as efficient, cost-effective and flexible ways of transferring knowledge and supporting employee development. The goal of this research project is to contribute to a broader understanding of the mentoring relationship as it pertains to acculturation and knowledge transfer/personal learning within the dyad, and to provide practical utility to (HRD) professionals in their efforts to facilitate acculturation and personal learning/knowledge transfer and create the greatest likelihood of success for mentoring dyads.

Secondly, the researcher, upon receipt of funding, will undertake a process evaluation of the Business Immigrant Mentorship program which will be submitted to Chamber management at the end of the project. A key goal of a process evaluation is to explore process fidelity by evaluating whether the mentoring program was implemented as stated in its original written objectives; and whether the program meets the identified business need(s). Such evaluation activities make it possible to identify strengths and challenges that

influence a program's success and replication. This evaluation will focus on the program's written objectives, implementation activities and measured outcomes. The process evaluation will facilitate a systematic investigation of the delivery of the mentoring program, the quality of its implementation, and an assessment of the organizational context, personnel, and procedures. A primary focus of the process evaluation that will be submitted to the Chamber is to highlight any gaps between the program plan and actual program delivery.

Participation

Participation in the study is limited to individuals participating in the program who are:

- mentor and protégé participants, and
- program personnel who may serve as key informants throughout this process.

Description of Research

Due to the lack of empirical information with regard to acculturation and how knowledge is transferred within the mentor/mentee dyad the study will utilize self-reporting of knowledge transfer employing one-on-one interviews, a retrospective survey questionnaire employing a Likert scale, and open-ended questions.

Interviews will not exceed one hour in length. Follow-up questions (where applicable) may be proposed to participants. Any questions arising from the interviews or subsequent follow-up will be answered on a timely basis. Interviews will be audio recorded. Surveys will be administered separately from

the interviews and will require approximately 40 to 50 minutes to complete. One survey will be administered at the completion of the program and one 12 or 24 months after the completion of the program.

Participants will be asked a number of questions about the program's written objectives, implementation activities and measured outcomes, and about the following areas:

Mentees

1. What do protégés perceive that they learned from their mentors in relation to their individual personal learning goals?

2. How do protégés think that they learned from their mentors; and what processes were employed that promoted successful learning? What have mentors done to facilitate experimentation and learning?

3. What is the experience of the protégé with mentored learning? How can experiences in receiving knowledge through mentoring be described? How is knowledge effectively disseminated within a mentoring relationship?

4. To what extent did the transfer of what was learned in during the program result in perceived performance improvement?

Mentors

1. What do mentors perceive that they taught their protégés in relation to the mentee's individual personal learning goals?

2. How do mentors think that they taught their protégés, what processes were employed that promoted successful learning? How was experimentation and learning facilitated for protégés?

3. What is the experience of the mentor with mentored learning? How can experiences in sharing knowledge through mentoring be described? How can knowledge be effectively disseminated within a mentoring relationship?

3. To what extent did the transfer of what was learned in during the program result in perceived performance improvement by protégés?

Research procedures include the following:

- Agreement to participate in the study will be indicated on the Research Consent Form, and returned to the researcher.
- Interview sessions will be scheduled and completed.
- The names of all participants will remain confidential, and will not appear in the final research report.
- A research report will be compiled, summarizing the information gained through the data collection process. Along with the summarization, the report will comment on any patterns identified and the researchers' understanding of the significance of the experiences reported.
- All efforts will be made to accommodate the preferred interview time and location of the participant.

- Participants are free to withdraw without consequence from the research project at any time, for any reason.

Potential Harms

There are no known harms associated with participation in this research. Each participant agrees to participate in only one interview, and may decline to be involved in follow-up activities. Participants retain the right to terminate interviews at any time.

Confidentiality

The confidentiality of those participating will be respected. Your employer will not be informed as to whether you have chosen to participate in this research or not. Reports and publications based on the information gathered will not contain the names of participating individuals, or provide information that might allow the names of participating individuals to be deduced. Only aggregate data will be summarized and reported.

Feedback

Responses gathered from the one-on-one interviews and the retrospective survey questionnaire employing a Likert scale and open-ended questions will be confirmed through member checking or respondent validation in an effort to build validity and reliability into the research. A summary of research findings will be forwarded to participants upon request.

Letter to Potential Participants

Dear Business Immigrant Program Mentee:

Please allow me to introduce myself. My name is Roxanne Reeves, I am a PhD Student at the University of New Brunswick. I am currently undertaking research on identifying best practices for cross-cultural mentoring. Specifically, I am researching the Business Immigrant Program in Saint John, Moncton and Fredericton to:

- Identify and describe perceived business and network gains on the part of the mentee.
- Study what knowledge transfer or learning occurs between mentor and protégé.
- Explore the possibility that mentoring can increase the understanding of cultural worldviews in cross-cultural mentoring relationships.
- Identify promising practices for cross-cultural mentoring.

As such, your feedback is officially requested. Your viewpoints and thoughts about what you think is working, and what isn't working are important to future cross-cultural mentoring efforts.

If you're willing to help out by answering survey questions, please contact me, Roxanne at roxanne.reeves@unb.ca and I will schedule a meeting time that is convenient for you. If you would prefer to reach me via telephone, you can do so at 1 (506) 471-7734.

Your input counts,

Roxanne Reeves

MITACS Fellow
Ph.D. Candidate University of New Brunswick
Lecturer University of New Brunswick (Economics)x
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Research Consent Form

Immigration Inc.: Immigrant Entrepreneur Mentorship Programs in New Destination Communities and Model Effectiveness

This project is on file with the UNB Research Ethics Board as 2011-087

I have read and understood the scope of the proposed research, and understand that I reserve the right to address any questions as they arise with the researcher. I reserve the right to withdraw my participation at any time.

I freely consent to participate in the attached described research project, as indicated by my signature below.

Signature Date

I would like to receive a summary of the key outcomes associated with this research.

Yes ***No***

Please print the following information:

Name: _____

Address: _____

Telephone: _____

Fax: _____

Email: _____

Chamber of Commerce Business Immigrant Mentorship Program Evaluation Questionnaire: Mentees

1. Demographic and General Information

a. Year of Arrival to Canada: Click here to enter text.
b. Where do you live? Click here to enter text.
c. Country of Birth: Click here to enter text.
d. What year were you born? Click here to enter text.
e. Level of education

- ☐ Secondary (high) school diploma or certificate
- ☐ Registered Apprenticeship or trades certificate or diploma
- ☐ College, CEGEP or other non-university certificate or diploma
- ☐ University certificate, diploma or degree
- ☐ Post-graduate Degree

Other: Click here to enter text.

f. What was your work or occupation in your previous country? Click here to enter text.

g. Marital Status:

- ☐ Never legally married
- ☐ Legally married (and not separated)
- ☐ Separated, but still legally married
- ☐ Divorced
- ☐ Widowed

h. First Language: Click here to enter text.

i. What language do you speak at home?

- ☐ English
- ☐ French
- ☐ Other – Specify Click here to enter text.

j. Have you lived elsewhere in Canada?

- ☐ Yes
- ☐ no

If yes where? Click here to enter text.

k. Where did you live **1 year ago**, that is, **February, 2011**? Click here to enter text.

l. What is your gender?

☐ Male

☐ Female

m. Do you own a business now?

☐ Yes

☐ no

If yes, what kind of business? Click here to enter text.
If no, do you plan on opening a business? Click here to enter text.

n. During the week of Sunday, 5 February to Saturday, February 11, 2011, how many hours did you spend working for pay or in self-employment?

Please enter the total number of hours worked for pay or in self-employment at all jobs held during the week of February 5 to February 11.Include:

- working for wages, salary, tips or commission;
- working in his/her own business, farm or professional practice, alone or in partnership;
- working directly towards the operation of a family farm or business without formal pay arrangements (e.g., assisting in seeding, doing accounts).

Number of hours (to the nearest hour) Click here to enter text.

o. For whom did you work? Click here to enter text.

For self-employed persons, enter the name of their business. If the business does not have a name, enter the person's name.

p. What kind of business, industry or service was this? Click here to enter text.

Please give details. For example:

- primary school
- municipal police
- wheat farm
- shoe store

q. What was this person's work or occupation? Click here to enter text.

Please be specific. For example:

- plumber
- fishing guide
- wood furniture assembler

- secondary school teacher

r. How did you learn about this mentoring program?
Remarks/Comment: Click here to enter text.

s. Beyond business support why did you decide to participate in the program? What was your motivation
- ☐ Challenge
- ☐ Learning Opportunity
- ☐ Networking Opportunity
- ☐ Publicity
- ☐ Other

If other, Click here to enter text.

t. How determined were you to stay in New Brunswick **before** you entered the Business Immigrant Mentorship Program?
- ☐ Determined
- ☐ Some What Determined
- ☐ Neutral, It didn't Mater
- ☐ Not Determined

Comments/Remarks: Click here to enter text.

u. How determined were you to stay in New Brunswick **upon completing** the Business Immigrant Mentorship Program?
- ☐ Determined
- ☐ Some What Determined
- ☐ Neutral, It didn't Mater
- ☐ Not Determined

Comments/Remarks: Click here to enter text.

v. Indicate the stage of your business when you began the program.
- ☐ Idea, Exploration and Research Stage
- ☐ Business Plan Completed
- ☐ Find Investors and Business Partners
- ☐ Build, Grow or Expand

Comments/Remarks: Click here to enter text.

w. Indicate the stage of your business at the end of the program?
- ☐ Idea, Exploration and Research Stage
- ☐ Business Plan Completed
- ☐ Find Investors and Business Partners
- ☐ Build, Grow or Expand

Comments/Remarks: Click here to enter text

2. Development Perspectives (What the relationship did for me?)

Rate your level of agreement or disagreement with each of these statements using the following scale:

1. Totally disagree
2. Somewhat disagree
3. Neither agree nor disagree
4. Somewhat agree
5. Totally agree

Or N/A ("not applicable" can be entered in any blank to indicate that a question or statement is not relevant

	Totally disagree (1)	Somewhat disagree (2)	Neither agree nor disagree (3)	Somewhat agree (4)	Totally agree (5)
a. Being a mentee enhanced my self-confidence					
b. Being a mentee helped me identify skills that I should develop					
c. Mentoring enabled me to better face the challenges relating to my business goals					
d. Being a mentee helped me to develop and update my skill set					
e. My participation opened up new business perspectives					
f. Participating as a mentee helped me "stand out" in my area of business					
g. Mentoring has given me access to key individuals within my area of business					
h. Mentoring represents a key activity for my business development					
i. Mentoring identified ways to upgrade my performance					
j. Mentoring enabled me to better define the direction I want my professional life to take					
k. Mentoring enabled me to better					

identify the means to attain my business goals					
l. Mentoring helped me identify specific, measurable, attainable, realistic and time-framed goals for starting my business					
m. Mentoring helped identify the weaknesses in skill sets that need development					
n. Mentoring better identifies the resources and support available for my development (training, upgrading, readings, special contacts)					
o. Mentoring provided useful feedback on progress toward business goals/business plan					

3. Perceptions of Communication between the Mentee and Mentor

Rate your level of agreement or disagreement with each of these statements using the following scale:

1. Totally disagree
2. Somewhat disagree
3. Neither agree nor disagree
4. Somewhat agree
5. Totally agree

Or N/A ("not applicable" can be entered in any blank to indicate that a question or statement is not relevant).

During the mentoring meetings, I felt...	Totally disagree (1)	Somewhat disagree (2)	Neither agree nor disagree (3)	Somewhat agree (4)	Totally agree (5)
a. understood					
b. guided					
c. inspired by my mentor's actions					
d. listened to					
e. excited by challenges raised					
f. supported in my efforts to upgrade my skills/knowledge base					

g. encouraged to develop new skills					
h. assisted in gaining new insights					
i. as though I was provided with an environment where I was comfortable to review less successful actions and develop new approaches					
I felt that my mentor....	**Totally disagree (1)**	**Somewhat disagree (2)**	**Neither agree nor disagree (3)**	**Somewhat agree (4)**	**Totally agree (5)**
j. regularly demonstrated that they could see my point of view					
k. provided moral support					
l. provided information related to living in New Brunswick					
m. gave me time to express myself					
n. misunderstood my expectations					
o. helped me explore options					
p. is sufficiently capable					
q. helped me make informed choices					
r. provided me with advise on business planning					
s. provided me with extended networking opportunities					

other: Click here to enter text

t. What problems, if any, did you come up against with your mentor and during your relationship?
(I.e. embarrassment or feelings of inferiority, expressing my apprehensions and fears, accessing mentor's expertise, accepting mentor's position as expert, speaking directly and communicating my thoughts in depth, understanding mentor's culture and values, seeing beyond my personal vision of things.)
Comment/response: Click here to enter text.

u. What did you find to be the most challenging about the mentoring relationship for you?
Comment/response: Click here to enter text.

v. What did you find to be the most challenging about the mentoring relationship for your mentor?
Comment/response: Click here to enter text.

3. Logistics and General Details

a. On average, how many times did you meet?
Comment/response: Click here to enter text.

b. Were meetings held on a regular basis?
Comment/response: Click here to enter text.

c. How long, on average, did each of these meetings last?
Comment/response: Click here to enter text.

d. What were the main topics dealt with in these meetings?
Comment/response: Click here to enter text.

e. Why do you think you were matched with your mentor:
Comment/response: Click here to enter text.

f. What are the benchmarks for effective mentoring/a good mentor?
Comment/response: Click here to enter text.

4. Cross Cultural and Integration Information

Rate your level of agreement or disagreement with each of these statements using the following scale:

1. Totally disagree
2. Somewhat disagree
3. Neither agree nor disagree
4. Somewhat agree
5. Totally agree

Or N/A ("not applicable" can be entered in any blank to indicate that a question or statement is not relevant).

Mentees

My Mentor,	Totally disagree (1)	Somewhat disagree (2)	Neither agree nor disagree (3)	Somewhat agree (4)	Totally agree (5)
a. discussed issues of cultural differences and perspectives.					
b. assisted me with cultural adjustment.					
c. helped with new approaches for cross-					

cultural situations.					
d. helped with new approaches for cross-cultural communication.					
e. exposed me to new insights or interpretations of situations with cultural dimensions.					
f. helped me to understand the Canadian context and adapt behaviour to best suit the context and maximize effectiveness					
g. helped me see new insights about myself.					
h. helped me see new insights about my situation.					
i. encouraged me to reflect on my actions.					
j. encouraged me to reflect on my decisions.					
k. grasped the context and challenges of your new life in small town Canada with regard to culture and adjustment challenges?					
l. accepted me for who I really am?					

m. Do you think mentoring has any particular weaknesses when used with entrepreneurs new to Canada?

☐ Yes
☐ no

If yes, what are those weaknesses?
Comments/Remarks: Click here to enter text.

n. How do you define mentoring?
Comments/Remarks: Click here to enter text.

o. From your cultural perspective how do you see the role of a mentor?
Comments/Remarks: Click here to enter text.

p. From your cultural perspective how do you see the role of a mentee?

Comments/Remarks: Click here to enter text.

q. Do you think mentoring has any particular strength(s) when used with immigrant entrepreneurs? If so, what are the benefits?
Comments/Remarks: Click here to enter text.

r. In what ways did you impact your mentor?
Comments/Remarks: Click here to enter text.

s. What is the difference in you before and after the program?
Comment/response: Click here to enter text.

t. Are there some specific things you do as an ethnic minority mentor that a non-ethnic minority mentor might not do?
Comment/response: Click here to enter text.

u. Are you still in contact with your mentor?
Comment/response: Click here to enter text.

v. Did your mentor help you expand your net work of business contacts?

☐ Yes

☐ No

If yes, by how many people? Click here to enter text.

w. Do you consider yourself a part of, integrated in, the local community?

☐ Not At All

☐ Slightly

☐	Moderately
☐	Very
☐	Extremely

Comment/response: Click here to enter text.

6. Conclusion

	Yes	No
a. If I had it to do over, I would choose to experience the relationship with the same mentor		
b. I would recommend this program to future mentors and mentees		

c. Were the desired outcomes achievable within the availability of the program		
d. Were the desired outcomes capable of being measured?		

e. Have you changed as a result of this program?

- ☐ Yes
- ☐ no

Comment/response: Click here to enter text.

f. Has your mentor changed as a result of this program?

- ☐ Yes
- ☐ no

Comment/response: Click here to enter text.

g. Have you ever thought about leaving the program, and if so, why?

- ☐ Yes
- ☐ no

If yes why? Click here to enter text.

h. In what ways can a successful mentoring relationship be evaluated?
Comment/response: Click here to enter text.

i. How close are you with your mentor?
Comment/response: Click here to enter text.

j. What value did you derive from the program?
Comment/response: Click here to enter text.

k. Describe your main feelings at the conclusion of your involvement in this program.
Comment/response: Click here to enter text.

l. Would you choose to participate in the program again?
Comment/response: Click here to enter text.

m. Is there anything we didn't discuss that you think is important to talk about?
Comment/response: Click here to enter text.

Thank you for your time.....

Interview Schedule

Mentee/Protégé	Mentor
What is the role of race or ethnicity in your mentoring relationship with your mentor?	What is the role of race, ethnicity in your mentoring relationship with your mentee?
Did your mentor grasp the context and challenges of your new life in small town Canada with regard to culture and adjustment challenges?	What do you perceive that you taught your protégés in relation to New Brunswick`s business culture? Could you give examples of how you may have provided cultural support?
Are there some specific things your mentor did for you as a new immigrant that supported your business aspirations? What did it mean for you to have the cultural piece addressed? How has your mentor supported you as a recent immigrant? [personally & professionally]	Are there some specific things you do as an ethnic minority mentor that a non-ethnic minority mentor might not do?
Did your mentor grasp the context and challenges of your new life in small town Canada with regard to culture and adjustment challenges?	How do you perceive you supported your protégés in relation to New Brunswick`s business culture and life in small town Canada?
Do you think mentoring has any particular strength when used with immigrant entrepreneurs? If so, what are those strengths?	Do you think mentoring has any particular strength when used with immigrant entrepreneurs? If so, what are those strengths?
Do you think mentoring has any particular weaknesses when used with entrepreneurs new to Canada? If so, what are those weaknesses?	Do you think mentoring has any particular weaknesses when used with entrepreneurs new to Canada? If so, what are those weaknesses?
Can you tell me the special aspects of your relationship that characterize it as a MENTORING relationship? What does he/she give you that other people in your life cannot give you?	Can you tell me the special aspects of your relationship that characterize it as a MENTORING relationship? What does he/she give you that other people in your life cannot give you?
In what ways are you different from your mentor? How do these differences affect your relationship? In what ways were you able to identify or not identify with your mentor?	In what ways are you different from your mentee? How do these differences affect your relationship? In what ways were you able to identify or not identify with your mentee?
What type of conversations did you have about race, ethnicity and perhaps gender regarding aspirations, experiences, and goals as an entrepreneur?	What type of conversations did you have about race, ethnicity and perhaps gender regarding aspirations, experiences, and goals as an entrepreneur?
Can you give me one example of something your mentor did that really made a difference in your life?	Can you give me one example of something your mentee did that really made a difference in your life?
Culturally speaking, to what extent were you and your mentors "co-learners" in the mentoring relationship?	Culturally speaking, to what extent were you and your protégé "co-learners" in the mentoring relationship?

Appendix C

Paper 3: Corporate mentorship programing: Promising program practices for "fast-tracking" future leaders

Research Information Form

MENTORSHIP EVALUATION PROJECT

Understanding mentored learning:

A question of how knowledge is transferred within the mentor/mentee dyad (Exploration embedded in a process evaluation of XYZ's corporate mentorship program)

This project is on file with the UNB Research Ethics Board as REB 2011-087

Researchers:

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For additional information regarding this research, potential participants may contact Dr. Patricia Peterson, Co-Executive Director, Health and Education Research Group, Faculty of Education, University of New Brunswick, plp@unb.ca, (506)458-7187 or Dr. Ann Sherman, Dean of Education, University of New Brunswick, (506) 453-4862, shermana@unb.ca.

Purpose of the Research

The purpose of this research project is twofold. First, data collected and the research outcomes will contribute to the researchers' PhD thesis and publication efforts regarding personal learning/knowledge transfer between mentees and mentors (the dyad). Formal mentorship programs are important mechanisms serving functions including **psychosocial,** interpersonal and the less researched personal learning/knowledge transfer function. Many in the human resource development (HRD) field view such mentoring programs as efficient, cost-effective and flexible ways of transferring knowledge and supporting employee development. The goal of this research project is to contribute to a broader understanding of the mentoring relationship as it pertains to knowledge transfer/personal learning within the dyad, and to provide practical utility to (HRD) professionals in their efforts to facilitate personal learning/knowledge transfer and create the greatest likelihood of success for mentoring dyads.

Secondly, the researcher will undertake a process evaluation of XYZ's mentorship program which will be submitted to XYZ management at the end of the project. A key goal of a process evaluation is to explore process fidelity by evaluating whether the mentoring program was implemented as stated in its original written objectives; and whether the program meets the identified business need(s). Such evaluation activities make it possible to identify strengths and challenges that influence a program's success and replication. This evaluation will focus on the program's written objectives, implementation

activities and measured outcomes. The process evaluation will facilitate a systematic investigation of the delivery of the mentoring program, the quality of its implementation, and an assessment of the organizational context, personnel, and procedures. A primary focus of the process evaluation that will be submitted to XYZ is to highlight any gaps between the program plan and actual program delivery.

Participation

Participation in the study is limited to individuals employed by XYZ Corporation who are:

- mentor and protégé participants, and
- program personnel who may serve as key informants throughout this process.

Description of Research

Due to the lack of empirical information with regard to how knowledge is transferred within the mentor/mentee dyad the study will utilize self-reporting of knowledge transfer employing one-on-one interviews, a retrospective survey questionnaire employing a Likert scale, and open-ended questions.

Interviews will not exceed one hour in length. Follow-up questions (where applicable) may be proposed to participants. Any questions arising from the interviews or subsequent follow-up will be answered on a timely basis. Interviews will be audio recorded. Surveys will be administered separately from the interviews and will require approximately 40 to 50 minutes to complete. An

additional survey may be administered at the completion of the program and one 12 or 24 months after the completion of the program.

Participants will be asked a number of questions about the program's written objectives, implementation activities and measured outcomes, and about the following areas:

Mentees

1. What do protégés perceive that they learned from their mentors in relation to their individual personal learning goals?

2. How do protégés think that they learned from their mentors; and what processes were employed that promoted successful learning? What have mentors done to facilitate experimentation and learning?

3. What is the experience of the protégé with mentored learning? How can experiences in receiving knowledge through mentoring be described? How is knowledge effectively disseminated within a mentoring relationship?

4a: To what extent did the transfer of what was learned in during the program result in perceived performance improvement?

Mentors

1. What do mentors perceive that they taught their protégés in relation to the mentee's individual personal learning goals?

2. How do mentors think that they taught their protégés, what processes were employed that promoted successful learning? How was experimentation and learning facilitated for protégés?

3. What is the experience of the mentor with mentored learning? How can experiences in sharing knowledge through mentoring be described? How can knowledge be effectively disseminated within a mentoring relationship?

4. To what extent did the transfer of what was learned in during the program result in perceived performance improvement by protégés?

Research procedures include the following:

- Agreement to participate in the study will be indicated on the Research Consent Form, and returned to the researcher.
- Interview sessions will be scheduled and completed.
- The names of all participants will remain confidential, and will not appear in the final research report.
- A research report will be compiled, summarizing the information gained through the data collection process. Along with the summarization, the report will comment on any patterns identified and the researchers' understanding of the significance of the experiences reported.

All efforts will be made to accommodate the preferred interview time and location of the participant. Participants are free to withdraw without consequence from the research project at any time, for any reason.

Potential Harms

There are no known harms associated with participation in this research. Each participant agrees to participate in only one interview, and may decline to be involved in follow-up activities. Participants retain the right to terminate interviews at any time.

Confidentiality

The confidentiality of those participating will be respected. Your employer will not be informed as to whether you have chosen to participate in this research or not. Reports and publications based on the information gathered will not contain the names of participating individuals, or provide information that might allow the names of participating individuals to be deduced. Only aggregate data will be summarized and reported.

Feedback

Responses gathered from the one-on-one interviews and the retrospective survey questionnaire employing a Likert scale and open-ended questions will be confirmed through member checking or respondent validation in an effort to build validity and reliability into the research. A summary of research findings will be forwarded to participants upon request.

Research Consent Form

Understanding mentored learning:
A question of how knowledge is transferred within the mentor/mentee dyad (Exploration imbedded in a process evaluation of XYZ's corporate mentorship program)
This project is on file with the UNB Research Ethics Board as REB 2011-087

I have read and understood the scope of the proposed research, and understand that I reserve the right to address any questions as they arise with the researcher. I reserve the right to withdraw my participation at any time.

I freely consent to participate in the attached described research project, as indicated by my signature below.

_____ _____

Signature Date

I would like to receive a summary of the key outcomes associated with this research.

Yes No

Please print the following information:

Name: _____

Position: _____

Office: _____

Address: _____

_____

Telephone: _____

Fax: _____

Email: _____

Letters to Potential Participants

Mentorship Research (from XYZ to participants)

As mentioned during our Mentorship Program feedback sessions we are currently working with a PhD student from the University of New Brunswick whose research is focused on the Mentor and Mentee Relationship.

As part of her research she will be conducting the following over the next couple of months –

- Distribution of an Electronic Survey to all Mentors and Mentees
- Individual Interviews with Mentors and Mentees.

Both research activities will ensure that your identity remains as anonymous and information shared back with the Company will not be individual but aggregate.

As part of your participation in this research you will sign a document outlining that you understand and consent to participating in the research and understand that you are doing so in confidence and that your name will not be disclosed to the Company.

The research findings and related recommendations will be helpful to the Company as we move forward with Mentoring at XYZ.

Please respond to this email and let me know if you are willing to participate in the research.

Please let me know by Friday, May 18th.

Following that, with your consent through responding to this email, the Researcher will be provided with your email address in order to send to you the Confidentiality Agreement and then the Electronic Survey.

Confidentiality Agreement

Good Afternoon _____, (from researcher to participants)

Thank you for agreeing to participate in the research I am undertaking as partial fulfillment of my PhD requirements. Obtaining feedback from participants is vital and I appreciate that you are taking the time to participate and share your experiences about the mentor program. As researchers endeavour to broaden our understanding of mentoring relationships and mentoring programs knowledge of both the positive and the negative, and what did or did not transpire during participation is crucial.

Attached you will find the research information and the consent forms. The consent form will need to be signed by you and returned to me before we can proceed with an on-line survey and later with the face-to-face interview. Upon receiving the signed consent form I will send you a link to the online survey. The face-to-face interview will be scheduled through XYZ after the completion of the survey.

I would propose that the quickest option is to either insert or paste your signature into the document and email it back to me, or print the consent form, sign, scan and email it back to me.

Signed consent form can also be faxed to 1-506-453-3569. If you do choose to fax the consent form please advise me via email to that effect. The fax cover page should be addressed to my academic supervisor Patricia Peterson (Attention: Dr. Patricia Peterson).

Thank you again for your time and consideration, it is very much appreciated.

Roxanne Reeves

XYZ Mentoring Program Evaluation Questionnaire: Mentees

1. General Information

   a. What is your present job position or/and job tasks? Click here to enter text.

   b. How long have you been with this employer?
   - ☐ 0-1 years
   - ☐ 1-3 years
   - ☐ 4-10 years
   - ☐ 11-15
   - Longer_____

   c. What is your gender?
   - ☐ Male
   - ☐ Female

   d. Have you ever had a mentor?
   - ☐ Yes
   - ☐ No

   If yes, was it a formal mentoring program (coordinated/managed) or was it an informal mentoring relationship?
   - ☐ Formal
   - ☐ Informal

   e. How did you learn about this mentoring program? Click here to enter text.

   f. Where are you in your relationship with your mentor?
   - ☐ Making Contact
   - ☐ Actually Underway
   - ☐ Concluding the Relationship
   - ☐ Redefining the Relationship

   If other, Click here to enter text.

   g. Level of education
   - ☐ Secondary (high) school diploma or certificate
   - ☐ Registered Apprenticeship or trades certificate or diploma
   - ☐ College, CEGEP or other non-university certificate or diploma
   - ☐ University certificate, diploma or degree

☐ Post-graduate Degree
Other: Click here to enter text.

2. Meeting's Functionality, Logistics and General Details

a. On average, how many times do you meet each month?
   ☐ Once
   ☐ 2-4 times
   ☐ More than 4 times
   Comment/response: Click here to enter text.

b. To what degree do you communicate with your mentor using technology (email, texting, phone etc)?

No Communication	Some Communication	Moderate Communication	Significant Communication	Very High Communication
☐	☐	☐	☐	☐

Explain: Click here to enter text.

c. How are your regular scheduled meetings held (telephone, e-mail, place of work, etc.)?
   Comment/response: Click here to enter text.

d. How long, on average, do each of these meetings last?
   ☐ 15 minutes
   ☐ 30 minutes
   ☐ 45 minutes
   ☐ 60 minutes
   Comment/response: Click here to enter text.

e. What are the main topics dealt with in these meetings?
   Comment/response: Click here to enter text.

f. Do you have a set agenda for your meetings?
   ☐ Yes
   ☐ No
   Explain: Click here to enter text.

g. Does your mentor use any practical methods or specific tools during your meetings (work plans, written ideas, review, storytelling, etc.)?
   Comment/response: Click here to enter text.

h. Does your mentor use any practical methods or specific tools during your meetings (work plans, written ideas, review, storytelling, etc.)?
Comment/response: Click here to enter text.

3. Activities Typical to a Meeting

Indicate whether the following activities typically occur in your program meetings.

Activities	Yes	No
a. Defining of the purpose of the meeting/outline of the meeting.		
b. Feedback on achievements and outcomes of the development goals.		
c. Clarification of organization's objectives and strategies.		
d. Identification of practice opportunities to test new skills.		
e. Discussion on ways to build networking contacts.		
f. Discussion of challenges at work.		
g. Discussion on ways to balance work and family.		
h. Discussion on organizational problems and transformations.		
i. Discussion on ways to develop your talent and skills within the context of the organization.		
j. Other: Click here to enter text.		

4. Personal/Developmental Benefits

Rate your level of agreement or disagreement with each of these statements using the following scale:

1. Totally disagree
2. Somewhat disagree
3. Neither agree nor disagree
4. Somewhat agree
5. Totally agree
6. n/a Not applicable

	Totally disagree (1)	Somewhat disagree (2)	Neither agree nor disagree (3)	Somewhat agree (4)	Totally agree (5)	N/A (6)
a. Being a mentee enhances my self-confidence.						
b. Being a mentee helps me identify weakness in my skill set that I should develop and strengthen.						
c. Being a mentee enables						

me to develop/update identified gaps in my skill set.						
d. Being a mentee helps me manage specific, measurable, attainable, realistic and time-framed goals.						
e. Being a mentee enables me to better face the challenges relating to my career stage.						
f. My participation in the program enhances my professional experience.						
g. My participation opens up new career perspectives.						
h. My participation in the program is an added value that I can use to advance my career.						
i. Being a mentee enables me to better define the direction I want my professional life to take.						
j. I have felt that the being a mentee has been a struggle at time (less availability for work responsibilities, meetings are demanding).						
k. Being a mentee helps me better identify what motivates me.						
l. Being a mentee better identifies the resources and support available for my development						

5. Knowledge Transfer and Personal Learning

a. What skills or competencies would you like to develop as part of your learning objectives?
Comment/response: Click here to enter text.

b. How will you know when you have achieved theses outcomes?

Comment/response: Click here to enter text.

c. Indicate the extent to which you think this mentorship program has influenced your personal development in each of the following qualities for you personally:

	No Influence	Some Influence	Moderate Influence	Significant Influence	Very High Influence
I. Strategic thinking	☐	☐	☐	☐	☐
II. Interpersonal skills	☐	☐	☐	☐	☐
III. Ability to manage dynamic relationships	☐	☐	☐	☐	☐
IV. Clarity in communicating	☐	☐	☐	☐	☐
V. Complex problem solving	☐	☐	☐	☐	☐
VI. Establishing clear goals and objectives	☐	☐	☐	☐	☐
VII. Building networks and coalitions	☐	☐	☐	☐	☐
VIII. Conflict resolution strategies	☐	☐	☐	☐	☐

d. What has changed about your work as a result of your participation in this program?
Comment/response: Click here to enter text.

e. List three (3) behaviours or skills that you use most frequently as a result of the program.
Comment/response: Click here to enter text.

f. Please identify any specific accomplishments/improvements that you can link to this program?
Comment/response: Click here to enter text.

g. Do you think mentoring has helped with your orientation or *onboarding* (if applicable)?
☐ Yes
☐ No
Comment/response: Click here to enter text.

h. What strengths or weakness do you think mentoring has for individuals challenging MBA accreditation (if applicable)?

Explain: Click here to enter text.

i. Please answer the following yes or no questions.

	Yes	No
I. Are my goals specific, concrete, and clear?		
II. Are my goals capable of being measured?		
III. Are my goals future oriented?		
IV. Are my goals achievable with the available time frame?		
V. Have completion dates been set for attaining my various goals?		

Comment/response: Click here to enter text.

6. Mentee Perceptions

a. Rate your level of agreement or disagreement with each of these statements using the following scale:

1. Totally disagree
2. Somewhat disagree
3. Neither agree nor disagree
4. Somewhat agree
5. Totally agree

n/a Not applicable

During the mentoring meetings, I feel...	**Totally disagree (1)**	**Somewhat disagree (2)**	**Neither agree nor disagree (3)**	**Somewhat agree (4)**	**Totally agree (5)**	**N/A (6)**
I. Understood.						
II. Guided.						
III. Inspired.						
IV. Listened to attentively.						
V. Supported in my efforts to upgrade my skills.						
VI. Supported in adapting to changes within the organization (as applicable).						
VII. Challenged at a level that is within my capability.						
VIII. Other: Click here to enter text.						

As a mentee, I feel my mentor....	**Totally disagree (1)**	**Somewhat disagree (2)**	**Neither agree nor disagree (3)**	**Somewhat agree (4)**	**Totally agree (5)**	**N/A (6)**
I. Adds value to my learning efforts.						
II. Is engaged in being a mentor.						
III. Identifies/provides resources and support available for my development or related to my learning goals (i.e., Training, upgrading, assigned work/exercise, assigned reading, special contacts).						
IV. Helps me make informed choices.						
V. Helps me identify potential ways to work towards my career goals.						
VI. Provides me with networking opportunities.						
VII. Discusses and understands my learning preferences.						
VIII. Helps identify weaknesses in skill sets that need development.						
IX. Helps me learn by adding examples of real world problems or case studies.						
X. Is sufficiently prepared for his/her role.						

c. What problems, if any, have you come up against with your mentor during your relationship? (Check the appropriate box)

- ☐ Explaining my needs with clarity.
- ☐ Lack of understanding regarding my role and responsibilities.
- ☐ Lack of understanding regarding my mentors role and responsibilities.
- ☐ Expressing my apprehensions and fears.
- ☐ Being able to learn from mentor's expertise.
- ☐ Understanding my mentor's position as expert.
- ☐ Speaking directly and communicating my thoughts in depth.
- ☐ Seeing beyond my personal views.
- ☐ Issues pertaining to confidentiality.

What additional barriers, if any, have you encountered?

Other: Click here to enter text.

d. In your opinion, did your mentor encounter any of these problems (or others)? If yes, which ones?
Comment/response: Click here to enter text.

e. How is work life different now that you have a mentor? (i.e. expanded network, increased understating of the corporate culture, professional isolation/participation)
Comment/response: Click here to enter text.

f. Have you ever thought about leaving the program, and if so, why?
Comment/response: Click here to enter text.

g. How have you changed as a result of this program?
Comment/response: Click here to enter text.

h. In your opinion, how has your mentor changed as a result of this program or in what way do you feel you have you impacted your mentor?
Comment/response: Click here to enter text.

7. Consistency of Mentorship Program and General Information

a. Rate your level of agreement or disagreement with each of these statements using the following scale:

1. Totally disagree
2. Somewhat disagree
3. Neither agree nor disagree
4. Somewhat agree
5. Totally agree

n/a Not applicable

I felt that ...	**Totally disagree (1)**	**Somewhat disagree (2)**	**Neither agree nor disagree (3)**	**Somewhat agree (4)**	**Totally agree (5)**	**N/A (6)**
I. The mentoring program I participated in is consistent with leadership behaviours and values of the organization.						
II. The program is consistent with the organizational goals for learning and development.						
III. The program has adequate resources and backup as support.						
IV. The organization has an attitude that facilitates innovation and experimentation with new ideas.						
V. The mentoring program is well structured.						
VI. The goals of the mentoring relationship were jointly defined						

from the outset.						

b. Mark this section out of 100		
How do you rate the quality of procedures for managing the mentoring program?		
I.	Relevance of match	% Click here to enter text.
II.	Method for making introductory contact between mentor and mentee.	% Click here to enter text.
III.	Preparation by your assigned mentee	% Click here to enter text.
IV.	Your preparation	% Click here to enter text.
V.	Support received by mentorship program coordinator	% Click here to enter text.
VI.	Indicate your overall satisfaction as a percentage	% Click here to enter text.

c. What additional support could be provided by management that would influence your ability to apply the skills and knowledge learned from the program?
Comment/response: Click here to enter text.

d. Do you have any other comments or suggestions for enhancing or upgrading the program, or comments or suggestions for the mentorship program director?
Comment/response: Click here to enter text.

e. What did you find to be the most challenging about participating in the program?
Comment/response: Click here to enter text.

f. Are there any additional supports or tools that would influence your progress?
Comment/response: Click here to enter text.

g. I would recommend this program to future mentors?
☐ Yes
☐ No

h. I would recommend this program to future mentees?
☐ Yes
☐ No

i. Other remarks you may wish to add?
Comment/response: Click here to enter text.

XYZ Mentoring Program Evaluation Questionnaire: Mentors

1. General Information

a. What is your present job position and/or job description? Click here to enter text.

b. How long have you been with this employer?

- ☐ 0-1 years
- ☐ 1-3 years
- ☐ 4-10 years
- ☐ 11-15
  longer _____

c. What is your gender?

Male

Female

d. Have you ever had a mentor?

Yes
No

e. If yes, was it a formal mentoring program (coordinated/managed) or was it an informal mentoring relationship?

- ☐ Formal
- ☐ Informal

f. How did you learn about this mentoring program?
Click here to enter text.

g. Where are you in your relationship with your mentee?

- ☐ Making Contact
- ☐ Actually Underway
- ☐ Concluding the Relationship
- ☐ Redefining the Relationship

If other, Click here to enter text.

h. Level of education

- ☐ Secondary (high) school diploma or certificate
- ☐ Registered Apprenticeship or trades certificate or diploma
- ☐ College, CEGEP or other non-university certificate or diploma
- ☐ University certificate, diploma or degree
- ☐ Post-graduate Degree

2. Meeting Functionality, Logistics and General Details

a. On average, how many times do you meet each month?

- ☐ Once
- ☐ 2-4 times
- ☐ More than 4 times

Comment/response: Click here to enter text.

b. To what degree do you communicate with your mentee using technology (email, texting, phone etc)?

No Communication	Some Communication	Moderate Communication	Significant Communication	Very High Communication
☐	☐	☐	☐	☐

Explain: Click here to enter text.

c. How are your regular scheduled meetings held (telephone, e-mail, place of work, etc.)?

Comment/response: Click here to enter text.

d. How long, on average, do each of these meetings last?

Comment/response: Click here to enter text.

e. What are the main topics dealt with in these meetings?

Comment/response: Click here to enter text.

f. Do you have a set agenda for your meetings?

Yes
No

Explain: Click here to enter text.

g. Do you use any practical methods or specific tools during your meetings (work plans, written ideas, review, storytelling, etc.)?

Comment/response: Click here to enter text.

3. Activities Typical to a Meeting

Indicate whether the following activities typically occur in your program meetings.

Activities	Yes	No
a. Defining of the purpose of the meeting/outline of the meeting.		
b. Feedback on achievements and outcomes of the development goals.		
c. Clarification of organization's objectives and strategies.		
d. Identification of practice opportunities to test new skills.		
e. Discussion on ways to build networking contacts.		
f. Discussion of challenges at work.		
g. Discussion on ways to balance work and family.		
h. Discussion on organizational problems and transformations.		
i. Discussion on ways to develop talent and skills within the context of the organization.		
j. Other: Click here to enter text.		

4. Personal/Developmental Benefits

Rate your level of agreement or disagreement with each of these statements using the following scale:

1. Totally disagree
2. Somewhat disagree
3. Neither agree nor disagree
4. Somewhat agree
5. Totally agree

n/a Not applicable

	Totally disagree (1)	Somewhat disagree (2)	Neither agree nor disagree (3)	Somewhat agree (4)	Totally agree (5)	N/A (6)
a. Taking on a mentors role enhances my confidence in my interpersonal relationship skills.						
b. Taking on the mentors role enhances my own professional						

experience.						
c. Taking on the mentors role enhances my visibility in my job and within JDI in general.						
d. Taking on the role of mentor helps me better understand the motives and needs of others.						
e. Taking on the role of mentor enables me to pass on my knowledge and experience.						
f. Taking on the role of mentor enhances my credibility with my supervisors.						
g. Taking on the role of mentor enables me to impart the values and strategic vision of the organization.						
h. Taking on the role of mentor enables me to better understand the challenges relating to my mentees career stage.						
i. I feel stretched by taking on a mentors role (less availability, meetings are demanding).						
j. My participation in the program is an asset I can use to advance my career.						

k. The mentoring relationship enhances my credibility among my immediate colleagues.						
l. Mentoring gives me the opportunity to learn from someone else.						

5. Knowledge Transfer and Learning

a. What skills or competencies would you like to develop as part of your participation as mentor?

Comment/response: Click here to enter text.

b. Indicate the extent to which you think this mentorship program has influenced your mentees personal development in each of the following qualities:

	No Influence	Some Influence	Moderate Influence	Significant Influence	Very High Influence
Strategic thinking	☐	☐	☐	☐	☐
Interpersonal skills	☐	☐	☐	☐	☐
Ability to manage dynamic relationships	☐	☐	☐	☐	☐
Clarity in communicating	☐	☐	☐	☐	☐
Complex problem solving	☐	☐	☐	☐	☐
Establishing clear goals and objectives	☐	☐	☐	☐	☐
Building networks and coalitions	☐	☐	☐	☐	☐
Conflict resolution strategies	☐	☐	☐	☐	☐

c. What has changed about your work as a result of your participation in this program?

Comment/response: Click here to enter text.

d. List three (3) behaviours of skills that you use most frequently as a mentor.
Comment/response: Click here to enter text.

e. Do you think mentoring has helped with your mentees orientation or onboarding?

Yes
No
Explain: Click here to enter text.

f. Do you think mentoring has any particular strengths when use with individuals challenging MBA accreditation?
Explain: Click here to enter text.

g. Please answer the following yes or no questions pertaining to your mentee's goals.

	Yes	No
Are the goals specific, concrete, and clear?		
Are the goals capable of being measured?		
Are the goals future oriented?		
Are the goals achievable with the available time frame?		
Are the goals achievable with the available time frame?		

Comment/response: Click here to enter text.

6. Mentor Perceptions

Rate your level of agreement or disagreement with each of these statements using the following scale:

1. Totally disagree
2. Somewhat disagree
3. Neither agree nor disagree
4. Somewhat agree
5. Totally agree

n/a Not applicable

A. During the mentoring meetings, I feel...	**Totally disagree (1)**	**Somewhat disagree (2)**	**Neither agree nor disagree (3)**	**Somewhat agree (4)**	**Totally agree (5)**	**N/A (6)**
I. Competent in my role.						
II. Satisfactory in my contribution.						

iii. Able to instil confidence.						
iv. Able to give useful feedback.						
v. Anxious regarding my mentees expectations.						
vi. I am a role model for the other person.						
vii. I am a good advisor.						
viii. I understand the phases of the mentoring relationship.						
ix. I am a resource person for facilitating skills development.						

B. As a mentor I feel that	**Totally disagree (1)**	**Somewhat disagree (2)**	**Neither agree nor disagree (3)**	**Somewhat agree (4)**	**Totally agree (5)**	**N/A (6)**
a. I add value to my mentee's learning efforts.						
b. I am engaged in being a mentor.						
c. I indentify/provide resources and support available for my mentee's development or related to my learning goals (ie. Training, upgrading, assigned work/exercise, assigned reading, special contacts).						
d. I have misunderstood my mentee's expectations.						
e. I help my mentee make informed						

choices.						
f. I help my mentee identify potential ways to work towards his/her career goals.						
g. I provide my mentee with networking opportunities.						
h. I discuss and understand my mentee's learning preferences.						
i. I help identify opportunities in my mentee's skill sets that need development.						
j. I assist the mentee's learning by using real world problems or case studies.						
k. My mentee is sufficiently prepared for his/her role.						

l. What problems, if any, have you come up against with your mentee during your relationship? (Check the appropriate box)

- ☐ Explaining my needs with clarity
- ☐ Lack of understanding regarding my role and responsibilities
- ☐ Lack of understanding regarding my mentee's role and responsibilities
- ☐ Issues pertaining to confidentiality
- ☐ Speaking directly and communicating my thoughts in depth
- ☐ Seeing beyond my personal views

m. What additional barriers, if any, have you encountered that have prevented you from effective mentoring? Other: Click here to enter text.

n. Did your mentee encounter any of these problems (or others) in your opinion?
If yes, which ones?
Comment/response: Click here to enter text.

o. Have you ever thought about leaving the program, and if so, why?
Comment/response: Click here to enter text.

p. How have you changed as a result of this program?
Comment/response: Click here to enter text.

q. In your opinion, how has your mentee changed as a result of this program or in what way do you feel you have you impacted your mentee?
Comment/response: Click here to enter text.

7. Conclusion

Rate your level of agreement or disagreement with each of these statements using the following scale:

1. Totally disagree
2. Somewhat disagree
3. Neither agree nor disagree
4. Somewhat agree
5. Totally agree

n/a Not applicable

A. I felt that ...	**Totally disagree (1)**	**Somewhat disagree (2)**	**Neither agree nor disagree (3)**	**Somewhat agree (4)**	**Totally agree (5)**	**N/A (6)**
a. The mentoring program I participated in is consistent with leadership behaviours and values of the organization.						
b. The program is consistent with the organizational goals for learning and development.						
c. The program has adequate resources and						

backup as support.						
d. The organization has an attitude that facilitates innovation and experimentation with new ideas.						
e. The mentoring program is well structured.						
f. The goals of the mentoring relationship were jointly defined from the outset.						

Mark this section out of 100	
B. How do you rate the quality of procedures for managing the mentoring program?	
I. Relevance of match	% Click here to enter text.
II. Method for making introductory contact between mentor and mentee.	% Click here to enter text.
III. Preparation by your assigned mentor	% Click here to enter text.
IV. Your preparation	% Click here to enter text.
V. Support received by mentorship program coordinator	% Click here to enter text.
VI. Indicate your overall satisfaction as a percentage	% Click here to enter text.

c. What additional support could be provided by management that would influence your ability to apply the skills and knowledge learned from the program?

Comment/response: Click here to enter text.

d. Do you have any other comments or suggestions for enhancing or upgrading the program, or comments or suggestions for the mentorship program director?

Comment/response: Click here to enter text.

e. What did you find to be the most challenging about participating in the program?

Comment/response: Click here to enter text.

f. Are there any additional supports or tools that would influence your ability to mentor more effectively?
Comment/response: Click here to enter text.

g. I would recommend this program to future mentors?
- ☐ Yes
- ☐ No

h. I would recommend this program to future mentees?
- ☐ Yes
- ☐ No

i. Other remarks you may wish to add?
Comment/response: Click here to enter text.

Process Evaluation XYZ's Mentoring Programs

Terms of Reference

The purpose and scope of this review of process documents is to contribute to the comprehensive review of XYZ's formal mentoring activities. Data sources for the development of the initial inventory included:

- **Background and Program Documentation:** Including foundation documents for the program and related policies.
- **Corporate/operational Documents:** Including documents related to the delivery and management of the program, operational guidelines, manuals, handbooks, and administrative reports.
- **Audits, reviews, assessments, and evaluations:** Including any previous evaluations, audits, surveys, and research studies.

Method of Analysis

The method of analysis is learner or user centered. The evaluative approach was deductive. The document review was conducted using a customized template that extracted relevant sections from the documents and organized it in tabular format and includes highly detailed recommend adjustments. This approach examined the documents in light of current research and identified promising practices in the field of mentoring. The quality and value of process documents were also evaluated.

Findings

This document review represents evaluation activities at a very early point in XYZ's attempts to implement mentoring programs that meets the needs of both the corporation and employees stakeholders. It is not intended to be perceived as a summative review, but rather as a formative evaluation designed

to enhance understanding, identify areas for priority action, and buttress the efforts of XYZ to expand learning opportunities for employees, as well as to support the company in its efforts related to succession planning and employee retention, for example. It should be noted that these efforts on behalf of the company are both laudable and proactive, and it is hoped that this evaluation will provide meaningful and supportive feedback regarding XYZ's efforts to enhance both work environments and performance outcomes.

With respect to the overall content of XYZ mentoring program materials, it is recommended that:

- Documentation be expanded and enhanced to provide additional practical resources for participants that include process tools, strategies, and techniques for understanding and operationalizing the mentoring process.
- Adult educational considerations be incorporated into all mentoring and orientation material.
- Mentor and mentees receive expanded training and orientation.
- Training is developed with a "users-guide" for the trainer/ program coordinator that would capture, standardize and ultimately duplicate mission critical behaviours.
- The role and responsibilities of program coordinator or the individual(s) supervising/mentor/mentee dyads be defined.

Regarding the intent and purpose of the program, it is advised that the revised materials frame mentoring in XYZ's constellation of learning practices

conveying, in sum, that the XYZ team learns powerfully and collectively, and is continually transforming itself to better collect, manage, and use knowledge for corporate success – their success.

Summary or Areas for Document and Program Enhancement

Suggested actions center on the adult learning relationship. Reorganization would be structured upon ten key themes, including:

- Mentor Preparation
- Mentee Preparation
- Matching Criteria
- Coordinator Responsibilities
- Relationship Management
- Management of Regular Meetings
- Development of Personal Development Plans
- Knowledge Transfer
- Adult Education Considerations
- Role of Status Reports, Evaluation and Progress Reports

Document Review Findings

Introduction

The purpose and scope of this review of process documents is to contribute to the comprehensive review of XYZ formal mentoring activities. This portion of the process evaluation was submitted to XYZ at the mid-point of the evaluation process for comment and input. This section consists of a review of

documents related to XYZ's efforts to institute mentoring programs within various sub-companies. The approach is learner or user centered; that is, the goal of the document review was to look at usability, accuracy of content, accessibility of format, and quality and value of the documentation. Thus, the evaluation assessed whether the user is acquiring accurate and adequate information about existing mentoring initiative(s) and practice. The document review was conducted using a customized template that extracted relevant sections from the documents and organized it according to indicators and evaluation questions. The quality and value of process documents were also evaluated; Appendix A includes a thorough description the document review methodology.

The review included a preliminary stock-taking of how the Business Mentoring Program and the Career Trak Program's were envisaged within XYZ's mentoring activities, and outlines patterns and trends for the integration of adult learning methodologies within this effort. On this basis, the document review endeavours to draw some conclusions and make recommendations for operationalizing and embedding adult learning methods, and for the inclusion of additional promising-mentoring practices within XYZ mentoring efforts. The review also aims to provide analyses that could inform the design of future XYZ mentoring programs. The assumption of the document review was that an examination of XYZ's mentoring document base would allow assessment of the overall program direction, which would help identify information gaps that would serve to deepen and extend later analysis activities.

Method

The intent of the document review was to examine key operational and relationship processes as outlined in existing documents. The evaluative approach was deductive or theory-testing, rather than inductive or theory-generating. This approach examined the documents in light of current research and identified promising practices in the field of mentoring. The process tended to be more explicit and more strongly informed by a priori reasoning. In other words, the deductive approach takes a general rule and attempts to apply it to specific cases, moving from broader generalizations to specific observations (Coryn, Noakes, Westine, & Schroter, 2011). In this case, a predominantly deductive framework approach was used to categorize and evaluate the relevant documents based on promising practices in the literature.

In sum, the document review was conducted using a customized template that extracted relevant sections from the documents and organized it according to indicators and evaluation questions. This approach examined the documents in light of current research and identified promising practices in the field of mentoring. The quality and value of process documents were also evaluated.

An initial document inventory was completed using existing and accessible documents relevant to the planning and implementation of the XYZ mentoring initiatives. Data sources for the development of the initial inventory included:

- **Background and Program Documentation:** Including foundation documents for the program and related policies.
- **Corporate/operational documents:** Including documents related to the delivery and management of the program, operational guidelines, manuals, handbooks, and administrative reports.
- **Audits, reviews, assessments, and evaluations:** Including any previous evaluations, audits, surveys, and research studies.

Documents Reviewed

This document evaluation analyzed available company documentation related to the development, implementation and evaluation of XYZ mentoring programs. A total of nine documents were identified, compiled and printed, including:

- Program Guide
- Program Overview
- Mentorship Program for Finance Professionals for Mentors
- Mentorship Program for Finance Professionals for Mentees
- Power Point Presentation
- Survey[1]

[1] To respect client confidentiality, reference documents have been redacted.

Organization of the Evaluation Report

Evaluation findings are organized as follows:

- A brief descriptive passage or summary notes regarding each document
- A table highlighting the accuracy and thoroughness of the each document
- A table rating the quality and value of the document

The key findings for this portion of the document review are presented in tabular format. Recommendations and adjustments are based on documented promising program practices, including:

- *Program elements*: Role of the program coordinator; mentorship program activities; operational issues; recruitment; placement and matching; assessment and orientation of the mentors and mentees; training of the mentors and mentees; routine monitoring of the dyad
- *Relationship characteristics*: Triangulation of the dyad with the program manager; policies related to structuring the relationship
- *Relationship scope*: Role definition and clarification, defining expectations; life cycle of the relationship; relationship management including relationship breakdown
- *Protégé outcomes*: Learning goals; professional development; measuring progress
- *Mentor growth and development*: Mentors' personal growth and skill development
- Organizational outcomes (Kram, & Ragins, 2007).

For the document quality portion, document content is reviewed, highlighting the quality, accuracy and thoroughness of each document. The purpose of rating the quality of content is to show to what degree the material is suitable for use and covers a broad spectrum of quality attributes. There are three major benefits to this method of documentation evaluation:

- Provides a snapshot of the quality of existing documentation. Changes made, will result in new and revised ratings which, can be compared against earlier versions.
- Criteria for the quality of documentation can be modified to reflect changes in priority, strategy, or direction. In this way the methodology remains valid regardless of the specific criteria used.
- Standardized measure allows for comparisons between different types of processes.

Evaluating the *quality* of content establishes to what degree the material is suitable for use covering a broad spectrum of quality attributes to make them applicable to a wide variety of different types of documentation. Documents are assessed against ten characteristics of usability.

- *Ownership:* Rates the degree to which the three key ownership roles – document/process owner, documentation custodian, and technical writer – are clearly identified, understood, and supported. For some processes, the same individual may have all three roles. In most cases, the

documentation custodian maintains the process documentation and reports to the process owner.

- *Readability*: Rates the clarity and simplicity of the written documentation. Items evaluated include the use of common words, terms, and phrases; correct spelling; proper use of grammar; and minimal use of acronyms, along with explanations of those that are used but not widely known. This characteristic especially looks at how well the level of the material matches the skill and experience level of the audience.
- *Accuracy*: Rates the technical accuracy of the material.
- *Thoroughness*: Rates how well the documentation has succeeded in including all relevant information.
- *Format*: Rates the overall organization of the material; how easy it is to follow; how well it keeps a consistent level of technical depth; to what degree it is documenting and describing an actual process rather than merely duplicating tables spreadsheets, and metrics.
- *Accessibility*: Rates the ease or difficulty of accessibility.
- *Currency*: Rates to what degree the current version of the documentation is up-to-date and the frequency with which it is kept current.
- *Ease of Update*: Rates the relative ease or difficulty with which the documentation can be updated, including revision dates and distribution of new versions.

- *Effectiveness*: Rates the overall usability of the documentation including the use of appropriate examples, graphics, color-coding, use on multiple platforms, and compliance with existing standards if available.
- *Accountability*: Rates to what degree the documentation is being read, understood, and effectively used; all appropriate users are identified and held accountable for proper use of the documentation (Schiesser, 2001).

*See Appendix A for a detailed outline of this method of evaluation.

Results

Process Evaluation XYZ Company

Introduction

The findings of this review are meant to be learner oriented or user centered; that is, each document is scrutinized for usability, accuracy of content, accessibility of format, and quality and value of the documentation. This process consists of a review of documents related to XYZ's efforts to institute mentoring programs within various sub-companies in efforts to:

- Buttress succession planning
- Cultivate the next layer or generation of XYZ leaders
- Manage skills training and/or certification
- Orient new hires

Documents collected include two that were in draft format. Given the embryonic state of these documents, they are not included in the review.

Documents Under Review

To respect client confidentiality, reference documents have been redacted. However, each document was thoroughly reviewed; this section was broken out into:

- Document Description
- Recommended Adjustments
- Document Quality

Discussion and Recommendations

Definition of Mentoring

There is often understandable confusion between *coaching* and *mentoring*. In spite of sharing many similarities and a common focus on growth and advancement, there are differences. Coaching, for example, is primarily concerned with skill development and the development of self-knowledge. Coaches are generally not subject matter experts, but rather experts on how people change. Within the business world, coaches have formal training and are paid for their services.

In contrast, mentors have experience to share with the mentee in the career, field, profession or job they share; it is the mentor's professional and/or workplace knowledge, expertise and network that give mentoring its distinctive character. Unlike a teacher or coach who is focused on a particular set of skills, a mentor is a guide. This definition allows for the possibility that a mentor may be younger than a mentee. The 21st century model has moved beyond the limitations of the traditional mentoring structure – one hierarchical in nature – to one that is more egalitarian, and based on equity rather than equality. In other words, both parties are stakeholders and accordingly, both parties have equity in the relationship (Jones, &Brown, 2011; Eby, Rhodes, & Allen, 2007). Mentoring is a transactional relationship grounded in learning; in this case, adult learning. The mentor is a facilitator of knowledge who assists in bringing clarity regarding the mentee's own aspirations for improvement, helping each mentee diagnose

the gap between aspiration and present level of performance. There is, however, more to mentoring than its definition.

What distinguishes this dyadic relationship from others is that in mentoring, the primary motive is to do with the transfer of knowledge, skills, values and psychosocial support. In sum, it is a special type of developmental relationship that is mutually beneficial for both parties as it evolves, and includes a range of career and psychosocial functions. Career functions refer to sponsorship, exposure and visibility, protection, and challenging assignments; psychosocial functions include role modeling, acceptance and confirmation, counselling and friendship (Ragins, Cotton, & Miller 2000). Throughout the duration of the relationship, the career functions and the psychosocial functions often occur concurrently. Though not mutually exclusive, many of the career functions of mentoring depend upon the organizational roles of both members of the dyad. The psychosocial functions of mentoring, however, require a personal commitment on the part of both the mentor and the mentee.

XYZ Context

Within XYZ's multiple holdings, mentoring efforts have been undertaken to:

- Buttress succession planning
- Cultivate the next layer or generation of XYZ leaders
- Manage skills training and/or certification
- Orientate new hires
- Increase retention (unstated/implicit)
- Networking (unstated/implicit)

In undertaking this review of the companies published documents and guidelines, it was noted that XYZ's mentoring initiatives meet the criteria of *formal mentoring programs*, which are characterized by the following criteria:

- Include training for participants
- Tie the mentoring program to business goals with measurable results
- Conduct periodic evaluations
- Offer on-going support for mentoring pairs (Ragins, et al., 2000)

In short, formal mentoring programs are organized, managed and monitored by someone outside the mentor-mentee dyad. Such programs, however, need not be strictly identified in program documents as "formal". The greater and more fundamental concern is that programing works, and works well.

With respect to the overall content of XYZ mentoring program materials, it is recommended that documentation be expanded and enhanced to provide additional practical resources that include process tools, strategies, and techniques for understanding and operationalizing the mentoring process. Regarding the intent and purpose of the program, it is advised that the revised material frame mentoring in XYZ's constellation of learning practices conveying, in sum, that the XYZ team learns powerfully and collectively and is continually transforming itself to better collect, manage, and use knowledge for corporate success – their success.

The intent of this final section of the report is to provide an overall summary of areas for program enhancement. Suggested actions center on the

adult learning relationship and the people in it. Reorganization should be structured upon ten key themes:

- Pre-service Training and Ongoing Training
- Mentor Preparation
- Mentee Preparation
- Matching Criteria
- Relationship Management
- Management of Regular Meetings
- Personal Development Plans
- Knowledge Transfer
- Adult Education Considerations
- Role of Status Reports, Evaluation and Progress Reports

Themes

Readiness for Mentoring, Pre-service Training and Ongoing Training

The development of pre-service training for mentors, and mentees specifies that training should include: a) the clarification of program objectives; b) discussion of the program requirements, and procedures; c) provide instruction on how to set expectations and boundaries of the relationship; d) discussion on how to handle a variety of situations; and e) concepts and strategies to help build the relationship between the mentors and mentees. Research on workplace mentoring confirms that the receipt and quality of

training correlate to perceptions regarding not only the effectiveness of the program but also to the mentoring provided (Finkelstein, & Poteet, 2007).

Ongoing training or periodic workshops should be considered with a focus on building additional skills as relationships progress. Topics should also address issues brought forth by mentors and mentees and staff. For example, discussion topics many include: what is going well in the relationship; what people are learning about how to be an effective mentor/mentee' what isn't working in the relationship; and specific question or situations with which the group can assist.

Mentor Preparation

Motivation drives participation in any relationship, and mentoring is no exception. **Motivation** has a direct impact on behaviours, attitudes, and emotional resilience in mentoring relationships. Encouraging employees to reflect upon their own sources of motivation before engaging in the mentoring relationship can affect the quality of the interaction within it. This step is important for all mentors, but especially important for new mentors who may assume that having subject expertise and experience is adequate preparation for being a mentor. Correspondingly, mentors who have an understanding of *why* they are participating end up more committed to it, are more likely to work at sustaining the relationship, facilitating the learning relationship effectively, and ultimately, growing from it personally. To help ensure that mentors volunteering for this role do not become disillusioned and frustrated an exercise to facilitate this step would be useful (Hung, 2003).

Thus, it is **recommended that mentors are given the opportunity during the orientation session to discuss their experiences with mentoring**. Resulting dialogue could provide valuable support for the mentors and offer insight for the program coordinator regarding each cohort of mentors. It would also provide an opportunity for XYZ to focus more attention on the learning opportunities that the mentor may be able to derive from the mentoring experience. Through group discussion during orientation, mentors may gain insights into potential learning objectives and outcomes for themselves, thus providing mentors with the opportunity to develop a "mentoring" style of management.

It is advised that **the benefits accrued by mentors be highlighted**. Mentors benefit differently from mentees through:

- Added influence and respect through the development of future leaders.
- Professional assistance from the mentee on work projects, which in turn may also enhance their own skills by the learning of new skills from the mentee and provide relief from some responsibilities.
- Access to fresh viewpoints and new perspectives about the organization.
- Opportunities to become the hub of a protégé network, and in the same way establish a network of reciprocity.

- Mentees "payback" in many ways including supplying critical information or assistance that will serve the mentor in some way when needed (Ramaswami, & Dreher, 2007).
- Part or this entire list, may be addressed during the private mentor training sessions.

It also suggested that the **mentors be given the opportunity to pause for self-reflection and perspective**. It is useful to provide mentors with opportunities to reflect upon their own mentoring experiences and also upon individuals who guided, supported and strengthened them, and to reflect on how their thinking has changed overtime. This said, mentors should then be prompted to consider the value of sharing their experiences with their mentees, and should also be warned of the tendency to project one's own experiences, learning needs and reality onto someone else. Facilitating a learning relationship begins with self-learning. The potential success of a mentorship relationship can be compromised without a mentor's commitment to personal learning (Zachary, 2000).

For training purposes it may be useful to have a group conversation prompting **mentors to reflect on their skill level** regarding:

- Brokering relationships
- Building and maintaining relationships
- Coaching
- Communicating
- Encouraging

- Facilitating
- Goal setting
- Guiding
- Managing conflict
- Providing and receiving feedback
- Such discussion could serve to highlight and clarify the desired mentor characteristics that XYZ values as transferrable to mentees.

Researchers have examined and identified characteristics thought to be important in mentors. Empathy supersedes all other characteristics (Allen, & Ebby, 2003). Other essential qualities include: a proactive personality, the ability to role-model, confidence, listening and communication skills, technical knowledge, credibility, commitment, patience, emotional intelligence, integrity, motivation, trustworthiness, the ability to teach, and a willingness to share knowledge (Allen & Ebby, 2003; Allen, Poteet, & Russell, 1997; Eby, et al., 2007; Wanberg, Kammeyer-Mueller, & Marchese, 2006). Empathy is also listed within research on organizational learning; the other three characteristics and skills of motivating instructors are; expertise, enthusiasm, and clarity (Knowles, Holton, & Swanston 2011).

Mentee Preparation

As with mentors, preparation is an integral step for mentees. Self-appraisal of personal development, an understanding of essential areas for improvement, and an awareness of personal approaches to learning can be

valuable exercises for mentees. **A mentee skill inventory may be useful and could include self-assessment** in the following areas:

- Giving and receiving feedback
- Self-directed learning
- Building relationships
- Communication
- Goal setting
- Effective listening
- Follow-through
- Reflection
- Initiative
- Valuing differences

The above-recommended self-assessment could enhance the existing section of the XYZ Development Plan that relates to mentees' backgrounds, educations, interests, motivations, abilities, challenges, hopes and past experiences. In broad strokes, mentors need to understand their mentees – who they are as persons. It is essential that **mentees arrive prepared**, and that they have had opportunities to consider and reflect upon these points. Mentees should be able to articulate their career vision and what led them to that vision; the reasons why they want to be paired with a mentor; the types of supports they require; and the nature of any barriers standing between them and their goals.

For mentees to get the most out of the mentoring relationships they will need to develop the ability to draw from feedback provided to them by the mentor. Mentees who are proactive and seek feedback accelerate their development. Thus, **program documentation should address issues such as asking for feedback, receiving feedback, accepting feedback, acting on feedback, and providing feedback**. Beyond managing feedback, mentees will require information on how to develop and maintain strong communication skills. **Program documents should include guidelines for mentees related to moving beyond listening in order to seek clarification of their understanding and accuracy of their assumptions; as well as to manage the mass of information and new knowledge emerging from the mentoring experience**.

Finally, it is important for mentees to understand that mentoring is a process of **self-directed learning facilitated by a mentor**; it is an opportunity to open one's mind to new ideas, fresh perceptions and alternative ways of thinking. Perhaps for some mentees, this will need to be expanded upon more than for others. In other words, one's life situation not only affects readiness to learn, but also readiness for self-directed learning experiences.

Matching Criteria

Research outcomes confirm that giving participants some level of **input** into the match increases the likelihood that mentors and protégés will be compatible, and that individuals will be linked in a relationship that meets their unique developmental needs, thereby increasing enthusiasm for the program.

Correspondingly, managers typically suggest that when employees are empowered to make decisions, they become self-directing and take ownership; in other words, psychological ownership is created (Wanberg, Welsh, & Heslett, 2003).

It is recommended that **matching criteria for the dyad be expanded to include**:

- *Perceived similarity*. Perceived similarity speeds the development of rapport and trust and can reduce uncertainty for both parties. To speed rapport, consider similarities such as academic or professional background, interests, or even family circumstances. Other considerations regarding similarity include:
    - For the mentor – the fund of relevant knowledge, experience, social capital, and psychosocial and communication ability.
    - For the mentee – the fund of prerequisite knowledge and experience, communication ability, and learning capabilities (Bozeman, & Fenney, 2008).
- *Recognition of ability*. On the part of the protégé, there is an expected visibility boost. On the part of the mentor, framing mentees as employees with high potential and ability rather than as those in need of help may ease mentor recruitment challenges. Mentors are encouraged by a match when they know "mentees [have been] be selected on the basis of their talent and potential, eagerness to learn and willingness to participate in mentoring" (Allen, et al., 2000, p. 271-

82). Correspondingly, individuals who are considering signing up as mentors are more likely to be drawn to a program populated by individuals whom they perceive as "winners" with high achievement motivation, and a strong learning goal orientation.

- *Learning Style.* Statistics Canada (2007) reports that 4.4 million Canadians have a disability (14.3% of the population). Many Canadians have learning disabilities, and all have preferred learning styles; matching the predominate learning style of both members of the dyad (e.g. activist, reflector, theorist or pragmatist) is worthy of consideration when matching and will influence the dynamics of the relationship (Trautman, 2007). Existing learning style instruments (e.g. Canfield's Learning Style Inventory) may be helpful in identifying commonalities within proposed mentoring dyads.

Relationship Management

A discussion of relationship management between the mentor and mentee is an opportunity to define lines of authority, clarify overlapping roles and responsibilities, and limit the potential for role confusion. **Pertinent questions such as *What is my role as a mentor/mentee*? or *What are my responsibilities as a mentor/mentee*? Will permit the dyad to come to a mutually agreed upon working concept of the mentoring relationship**. Additional questions might delineate responsibility: Who will be responsible for what?

For the mentor, **strategies for initial conversations** can include:

- *Let's begin by discovering what we share.*
- *Have you ever taken part in a mentoring program or had a mentor/mentee before?*
- *If so, what did you learn from that experience?*
- *What do you want to learn from this experience?*
- *What do you want out of the relationship?*
- *How would you like to go about achieving your goals?*
- *What is the most useful kind of assistance I can provide?* (Zachary, 2000)
- *What relationships outside of this one would you like to build?*

The topic of **confidentiality should be further expanded upon in program documentation**. Individuals have differing expectations of what confidentially means, and varying approaches to safeguarding information. The mentor and mentee must check their own assumptions against each other if they are to share mutual accountability for the mentoring partnership. There must be consensus and clarity about what confidentiality means within the relationship to promote open, authentic, free-flowing and candid communication. A question to safe guard confidentiality might be:

- *How do we protect the confidentiality of this relationship?*
- *What are the not-to-exceed limits of this relationship?*
- *Does what we discuss stay between us for a long as we are engaged in our mentoring relationship?*

- *If I'm asked by your supervisor, can I freely disclose our conversations?*
- *After our formal mentoring relationship has ended, it is okay to talk about what we discussed or how we related?*
- *If there is a demonstrated need to know, can I appropriately disclose our conversations, my impressions, or anything else that pertains to the relationship?*
- *What type of issues will be kept confidential?*
- *It is okay to talk about what we talk about as long as it is positive?* (Zachary, 2000)

In addition to confidentiality, **guidelines for structuring a frank discussion about the limits and boundaries of the mentoring relationship is recommended**. Such conversations help ensure that the focus of the relationship remains firmly on learning. It is important for the dyadic pair to communicate what they are willing and unwilling to do; in other words, *relationship ground rules*. Accessing and maintaining contact should also be negotiated at this time in an effort to identify communication preferences, and to define boundaries within the relationship. Recommended discussion points include:

- *Are we conscientious about safeguarding boundaries?*
- *What kind of access does the mentee have to you?*
- *What is the limit?*
- *Is an appointment necessary?*

- *What kind of email/telephone access does the mentee have to you?*
- *Will your mentee need to go through a "gatekeeper" to get to you?*

As challenges and miscommunications are to be expected, **it is recommended that clearer instructions be included regarding relationship breakdown and the role of the coordinator**. In an effort to mitigate potential problems, offering the dyad example conversation openers may be useful, including:

- *Because of our differences there will be times when I do not understand you perspectives or experiences. I'll try to let you know when this is happening so you can tell me more – I invited you to do the same.*
- *Because your progress is important to me, I need to raise what might be a difficult issue…. How do you see this?*
- *I've become uncomfortable with…. I'll bet you have a different opinion.*
- *….. Do you feel comfortable with this? Do you have any other suggestions to help us bridge our differences?*

It is important to remind the dyad to keep the emphasis on learning, it is the first priority. Mentoring is neither a chemistry nor a personality contest (Zachary, 2000).

The dyadic relationship will at some point come to a close. **Assigning relationship closure as a point of discussion within the dyad can help participants evaluate learning outcomes and identify how to maximize and**

build on learning. This is no less the case for relationships that have been beset with problems. Closure can be navigated with prompts such as:

- *Let's look at some of the positives and negatives of our relationship so that we can each learn something from it;*
- *Although we haven't been able to accomplish all of your goals, we were successful with……..*

Management of Regular Meetings

Regular information sharing is fundamental to a successful mentoring relationship. There are many existing formulas from which mentors can draw in order to get the most out of meetings. **It is recommended that program documentation include guidelines and prompts to enhance meeting efficacy.** Such guidelines may include prompts to:

- Define the purpose of the meeting
- Explain the relationship of the goal to the job/mentee's learning goals
- Outline the main points
- Note the jargon
- Identify practice opportunities
- Provide additional resources
- Provide context
- Connect the purpose of the meeting and its usefulness/applicability to the mentee's work or learning objectives (Trautman, 2007).

As stated in the *Mentorship Program for Finance Professionals Guide*, **it best to encourage mentees to ask for advice**. Mentors who encourage mentees to take initiative in asking for feedback facilitate self-directed learning, the goal of every session between the dyad. The examples provided in the Guide are good and should be expanded upon to ensure that the feedback is thoughtful, candid and constructive. Additional prompts beyond "tell me about it...." Include sample dialogues that help:

- *I notice that .....The impact of that is.....;*
- *I have some suggestions for solving the problem. Can I tell you about them? My recommendation is ..... .*
- *I have a few ideas that might help.....*
- *What works for me is.....*
- *How might some else see that behaviour?*
- *Help me understand what you are saying?*
- *Have you ever considered....?*
- *To be honest with you I need a little time to think about that* (Zachary, 2000)

Zachary (2000), pointed out that mentors, in addition to their expertise and experience, need to be familiar with specific process skills that can facilitate the mentoring process. The following strategies could be particularly useful:

1. Asking questions that will help mentees to reflect on and articulate their own thinking, for example
    - *Could you tell me a bit more about what you mean by...?*

- *It sounds as if this is the tip of the iceberg. Let's think about this some more and discuss it at our next conversation.*
- *That's an interesting way of describing the problem. How would you apply that to individuals of a different gender?*

2. Reformulating statements help mentors to clarify their own understanding and encourage mentees to reflect on what they articulated, for example
    - *I think what I heard you saying was …*
    - *My understanding* is…

3. Summarizing helps to remind the mentoring partners of what has transpired and allows both parties to check out assumptions in the process, for example
    - As a result, I feel we have achieved…
    - We've spent our time this morning… but I gather you feel you'd rather…

4. Listening for silence – Silence can indicate boredom, confusion, discomfort or embarrassment. On the other hand, some individuals just need time out to think quietly.

5. Providing feedback that is authentic and suggests future action, for example
    - *I like the way you… next time you might try…*
    - *You made a really good start with… what I'd like to see is…*

Monitoring the quality of meetings is encouraged; **mentors should be encouraged to raise the issue of meeting efficacy for regular review and discussion**. Discussion points may include:

- *Is our communication clear and misunderstanding infrequent?*
- *Are we conscientious about safeguarding confidentially?*
- *Is feedback regularly provided and is it two-way?*
- *Do we check in with each other to make sure that we stay on track with the learning goals?*
- *What is the quality of our interactions?*
- *In the process we're using working to facilitate your learning*
- *In what ways are your learning needs being met? Not met?*
- *What are you learning about yourself as a learner?*
- *What is your greatest success thus far?*
- *What is your greatest frustration thus far?*
- *What gives you the most satisfaction about what you are learning?*

The mentor should also be supported in efforts to track the mechanics of the relationship. Questions about the mentee and the mechanics of the relationship may include:

- *What am I thinking?*
- *What is my most difficult mentoring challenge so far?*[8]
- *What is working well?*
- *What could be working better?*
- *What new learning has affected me?*

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[8] Existing research clearly identifies not only the benefits but also the challenges associated with mentoring correspondingly; conflict-free relationships are rare; both parties should be dually prepared of the eventuality of challenges within the relationship.

Mentors should be encouraged to periodically access their relationships with mentees. Example areas for examination may include:

- *What is the quality of our interactions?*
- *What is the learning process?*
- *What might I/we do to make the process work better for you?*
- *What might I/we do to make the progress toward learning work better?*
- *What is my greatest success thus far?*

At the conclusion of each meeting, mentors should be encouraged to check "next-steps." This can be accomplished by asking any of the following questions:

- *Before you leave, could you talk me through your next steps?*
- *What are your action items from this meeting?*
- *What are you going to do when you leave my office?*
- *Do you have any comments for me?*

Personal Development Plan

Mentoring is solidly embedded in learning. **A personal development plan is instrumental in ensuring that the relationship is focused on meeting mentees' learning goals and objectives, providing a structure for systemizing learning.** The creation of an action plan ensures, on the part of the mentee, that a high degree of responsibility is taken not only for learning, but also for the co-creation of a systematic procedure for evaluating learning outcomes. Together, the mentor and mentee appraise what collection of

evidence needs to be in place to determine whether desired changes took place. Mentors also need to negotiate with mentees regarding what evidence needs to be presented to prove that the desired changes took place (Zachary, 2000; Knowles, Holton, & 2011). Additional questions may include: *Are the goals well defined and clear? Will I know what success looks like when I see it?*

The personal development plan should prompt the mentee not only to articulate his/her vision and goals but also to analyze what gaps exits between his/her vision and their current competency. During this process, the learning styles/preferences of both the mentor and mentee should be discussed. It is important for both parties to know how the other works best; is it from doing, watching, listening, or from experimenting with new knowledge and subjects? **This portion of the guide could also include guidelines related to the discussion of "soft-issues," such as the kind of support the mentee requires and what assistance the mentee sees as most useful.**

Adult learners have a deep need to be self-directing; correspondingly **the Personal Development Plan should address**:

- Competencies
- Learning goals
- Layout objectives
- Identify learning tasks
- List potential resources
- Set target dates
- Set accountability assurances
- Delineate responsibility

- Outline success criteria and measures
- Protocols for addressing stumbling blocks (Zachary, 2000; Knowles, et al., 2011)

To gauge the clarity of the mentees' goals for the dyad, **it is recommended that documentation provide guidelines for the identification of goals that are:**

- **Specific**
  - What is it the mentee is trying to accomplish within the relationship?
  - Are the mentee's goals specific, concrete and clear?
- **Measurable**
  - Are the goals capable of being measured?
  - In what way can success be measured?
- **Action Oriented**
  - Are the goals future oriented?
  - What results should be seen when the mentee's goals are accomplished?
  - What concrete things will the mentee be able to do as a result of accomplishing the goals identified?
- **Realistic**
  - Are goals achievable within the available time frame?
  - Are there other resources that need to be available in order to achieve the goals?

- **Timely**
  - Is the time allocated for accomplishing the learning goals reasonable?
  - Has a completion date been set for attaining the goals? (Zachary, 2000)

It is impossible for one mentor to meet all of the mentee's needs. Within the personal development plan there should be space to generate a **list of learning opportunities both within XYZ and outside the company that can offer exposure to other role models, advisors, and mentors; and opportunities that can offer new learning, reinforce new learning, and accelerate learning;** experience is the richest source for adult learning (Knowles, et al., 2011).

In sum, a personal development plan provides a discipline to help stay the course and encompass the vision of where the mentee wants to be – this is the challenge before the mentor.

Knowledge Transfer

It is recommended that program documentation remind mentors that their role is to engage in a process of mutual inquiry with the mentee, rather than a relationship that merely transmits knowledge and measures conformity to it. Mentees may need guidance and empathy in coping with multiple points of view, making wrong decisions, and dealing with uncertainties (Gross Davis, 2009).

Central to following though with the personal development plan is an emphasis on *deep learning* and not just surface learning. There are various tools available to mentors in their efforts to help mentees achieve their learning goals. For example, to support mentees' efforts to understand the significance and meaning of new material, **it is recommended that program documentation remind mentors that their role is to engage in a process of mutual inquiry with the mentee, rather than a relationship that merely transmits knowledge and measures conformity to it.** It is advised that the mentor inform the mentee that this type of cross-checking is part of the mentoring process and will be included to encourage their efforts to achieve their goals. Suggested phrases to facilitate this process include:

- *Tell me about your recent experience with...*
- *Tell me what you know about.....?*
- *Talk me through the steps.*
- *Why don't you read your notes back to me so I can make sure I've been clear?*
- *To make sure I've covered the last topic clearly, I'm going to give you a minute to talk me through those last few items/steps.*
- *Why don't you explain back the main points you've heard me cover?*
- *Tell me what you heard me say.*
- *What do you mean by.....?*
- *Could you tell me more about what you meant when you said.....*
- *What, if anything is holding you back now? (Zachary, 2000; Trautman, 2007)*

In contrast, commonly-used but ineffective closed ended questions that should be avoided include:

- *Did you get it?*
- *Are you with me?*
- *Do you follow me?*
- *Do you understand?*
- *Id this working for you?*
- *Are you on top of this?*
- *Is this making sense to you?*
- *Are you okay here?*
- *Any questions? (Trautman, 2007)*

Having **mentors check frequently with mentees during knowledge transfer activities** protects the mentor from having to revisit the same information, and potentially from having to repair problems due to ineffective knowledge transfer processes.

Having the mentor **summarize the meeting or learning points** can help the mentee solidify what transpired in a session and allow for the mentor to check our assumptions in process. This can be achieved by asking: We've spent out time today..... During that time we..... As a result, we achieved the following outcomes..... (Zachary, 2000).

Adult Education Considerations

Learning differs from teaching. Traditional educational models to not teach learners to be self-directed; learners have been conditioned to be dependent on teachers to teach them. Some effort may be required to shift this erroneous perception and manage any "culture-shock" if this is the mentor's or the mentee's first exposure to the transactional modeled of adult education. Such a model requires the student, or in this case the mentee, to be front and center in the planning and evaluation of his/her own learning (Peterson, 2011).

In redesigning the mentor program itself and in particular, the orientation to the program, **it is recommended that XYZ employ a Universal Design for Learning methodology (UDL)** (CAST, n.d.). UDL refers to the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design. The principles of UDL (CAST, n.d.) dictate that educational programs:

- Promote learner-centeredness
- Enhance the learning experience for all participants
- Create conditions conducive for learning

Note that the term "universal" does not imply that one size fits all. The term implies universal access to the content being delivered. Instructional materials and activities should provide flexibility in use, participation and presentation. Thus, **instructional materials and activities should:**

- Be accessible and fair
- Electronic materials to facilitate access to essential course information

- Lecture outlines
- Key points
- Provide flexibility in use, participation and presentation
    - Presentations via lecture, text, images, audio
    - Variety of teaching strategies – discussion/problem solving exercises
    - Group work to foster peer-to-peer learning
- Should be straightforward and consistent
    - Lectures - consistent with content objectives
    - Concept maps for complex topics
    - Simple language
- Should be explicitly presented and readily perceived
- Face the group when speaking – use a well modulated voice
- Provide a summary of key points a few days before the workshop or session
- Allow choice of information formats
- Consider using PowerPoint instead of handwritten notes on overhead
- Clearly identify major topics and essential information
- Avoid jargon, culture-specific language, or too many acronyms
- Provide a supportive learning environment
- Sample assignments
- Collaborative learning opportunities
    - Case study review

- Group work
- Modeling
- Opportunity for practice (CAST, n.d.)

Role of Status Reports, Evaluation and Program Review

Adult education is continuing education. Status reports and end of program evaluations are also opportunities for ongoing development. **It is recommended that status reports and evaluation processes be reorganized as launching pads to highlight and extend personal development.** As such, end of program evaluations should be expanded to focus on future learning interests – on how participants envision expanding their current skill set and competencies to continue their development journey. With such questions, there may be opportunities to catapult learning to another level. Both mentors and mentees should be required to fill out status reports and end of program evaluations, providing opportunities for both parties to learn from a retrospective examination of the mentorship experience.

It is recommended that status reports and end of program evaluations be used not only at rigidly scheduled times, but also if the mentoring arrangement is pre-empted. Such documentation will provide a point of transition for what is to follow (full closure of the relationship; the transition of roles to friend, manager, or colleague; or the continuation of the mentorship relationship). These forms should also include a re-evaluation of the goal(s) of the program.

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Appendix A

Methodology to Evaluate Process Documentation

There are three major benefits to this method of documentation evaluation. The first is that it gives a snapshot of the quality of existing documentation at that point in time, particularly documentation of high value. If improvements are made to the material that result in new ratings, then they can be compared to the current rating.

The second benefit is that this method gives us the ability to customize the criteria for quality of documentation to reflect changes in priority, strategy, or direction. In this way the methodology remains applicable regardless of the specific criteria used. The third benefit of this method is that it allows comparisons between different types of processes within an infrastructure using the same standard of measure.

The purpose of evaluating the *quality* of content is to show to what degree the material is suitable for use. The quality of the content of documentation is evaluated with ten common characteristics of usability. Each of these is described below.

- Ownership—Rates the degree to which the three key ownership roles—document/process owner, documentation custodian, and technical writer—are clearly identified, understood, and supported. For some processes, the same individual may have all three roles. In most cases the documentation custodian maintains the process documentation and reports to the process owner.

- Readability—Rates the clarity and simplicity of the written documentation. Items evaluated include the use of common words, terms, and phrases; correct spelling; proper use of grammar; and minimal use of acronyms, along with explanations of those that are used but not widely known. This characteristic especially looks at how well the level of the material matches the skill and experience level of the audience.
- Accuracy—Rates the technical accuracy of the material.
- Thoroughness—Rates how well the documentation has succeeded in including all relevant information.
- Format—Rates the overall organization of the material; how easy it is to follow; how well it keeps a consistent level of technical depth; to what degree it is documenting and describing an actual process rather than merely duplicating tables spreadsheets, and metrics.
- Accessibility—Rates the ease or difficulty of accessibility.
- Currency—Rates to what degree the current version of the documentation is up-to-date and the frequency with which it is kept current.
- Ease of Update—Rates the relative ease or difficulty with which the documentation can be updated, including revision dates and distribution of new versions.
- Effectiveness—Rate the overall usability of the documentation including the use of appropriate examples, graphics, color-coding, use

on multiple platforms, and compliance with existing standards if available.

- Accountability—Rates to what degree the documentation is being read, understood, and effectively used; all appropriate users are identified and held accountable for proper use of the documentation.

These ten characteristics are intended to cover a broad spectrum of quality attributes to make them applicable to a wide variety of different types of documentation.

Each characteristic for quality can be rated on a 0 to 3 scale based on the degree to which elements of each characteristic were met. The ratings are defined as follows:

3—All aspects of the characteristic have been met or are present.

2—A significant, though not entire, portion of the characteristic has been met or is present.

1—A small portion of the characteristic has been met.

0—None or an insignificant amount of the characteristic

The University of New Brunswick

Curriculum Vitae

SECTION 1: BIOGRAPHICAL

Surname: **Reeves** **Given Names:** **Roxanne**

Faculty/Department Address:
Faculty: Renaissance College
P.O. Box 4400
Fredericton, New Brunswick,
Canada E3B 5A3
Office Phone No. (506) 447-3092

Email Address:
Roxanne_Reeves@hotmail.com
Roxanne.Reeves@unb.ca

Present Citizenship Status: Canadian

SECTION 2: EDUCATION

2.1 Post Secondary Education (Date, Institution, Degree)

PhD, Education Studies, 2009 – 2014 University of New Brunswick
Master of Arts, Labour History, 2009 University of New Brunswick
Bachelor of Arts, History, Economics, 2006 University of New Brunswick

2.2 Title of Graduate Thesis and Supervisor's Name:

Doctor of Philosophy, Graduate Academic Unit of Education

Title Corporate Mentorship: An Article-Based Examination of Corporate and Cross-Cultural Implications for Organizations, Mentors and Mentees

Description Cross-cultural mentoring, work-place mentoring, knowledge transfer or personal learning within the scope of mentoring, and process evaluation as a quality assurance tool.

Master of Arts, Labour History, 2009

Title Collective Bargaining for New Brunswick Nurses by New Brunswick Nurses 1965-1969: In Unity there is Strength

Description Labour Relations, Canadian Economic History, Women's History

2.3 Other Formal Education (if applicable):

Foundations of Project Management, 2014 MITACS

Diploma in University Teaching, 2010 University of New Brunswick

Universal Design for Learning, 2013 Center for Applied Special Technologies, MA, USA

2.4 Briefly Indicate General Area (s) of Academic Interest:

integrative literature review, mentoring, cross-cultural, intercultural, high potential employees, process evaluation, immigrant, entrepreneur, new destination communities, ethnic enclave

SECTION 3: EMPLOYMENT

3.1 Employment History at UNB

Part-time Professor, Renaissance Leadership College, University of New Brunswick, Fredericton Campus, Fall 2012 - current

Graduate Assistantship, Faculty of Education, UNB, 2013

Part-time Professor, Department of Economics, University of New Brunswick, Fredericton Campus, 2010

Graduate Assistantship, Faculty of Education, UNB, 2009-2011

Graduate Assistantship, Faculty of Arts, Department of History, UNB, 2006-2008

3.2 List Relevant Previous Employment in Chronological Order

Special Counsel to the Leader of the Liberal Party, 2002-2010

Artisan/Owner, Roxanne Reeves Stained Glass Designs, 1997-2006

Marketing Manager, Aitkens Pewter, New Brunswick and Nova Scotia, 1998, 2000-2001

Artisan, Vetrate Artistiche Toscane, Siena, Italy, 1999

Artisan, G2 Stained Glass Studio, Nagoya, Japan, 1995-1997

Etiquette and Protocol Consultant - Business/Corporate/Social Japan 1991-1997 *Minolta Camera Corporation - Time Life Magazine, Time T.I. - Mitsubishi Motor Corporation - Honda Motor Corporation - Toyota Motor Corporation - Nippon Denso/Japan Steel – Bank of Nagoya*

English as an Additional Language Instructor (EAL) Japan 1990-1997 *ECC Language School - Trident Educa*tion *Systems - Trident College - Kawai Juku*

3.3 Leaves granted by UNB or other University (type, date)

- Sabbatical Leave
- Study Leave
- Leave of Absences With or Without Remuneration

3.4 Distinctions, Honours, Fellowships, Scholarships (with dates)

General Awards

ALPS Bursaries for Part-time Students $500.00

Competing External Awards

MITACS Accelerate Internship, 2011-2012 $40,000.00

Competing Internal Awards

UNB Part-time Graduate Students Merit Award, 2012 $800.00

Fellowship, New Brunswick Labour History Project, 2006-2008
"Re-Connecting with the History of Labour in New Brunswick: Historical Perspectives on Contemporary Issues" $20,000.00

SECTION 4: DISSEMINATION OF KNOWLEDGE

4.1 Courses Taught in preceding 5 years (indicate course number and title, year, enrolment)

❖ Renaissance Leadership College, University of New Brunswick, Fredericton Campus

- **Integrative Leadership Forum II,** RCLP 1112, 2013WI (3 Credit Hours)

Course Description: The forum provides an opportunity for integrative dialogue and study of contemporary issues and their complex relationships from a critical

interdisciplinary perspective. Includes a combination of group discussion and problem-solving as well as individual study.

- **Community Problem Solving,** RCLP 4928, 2013FA/WI (6 Credit Hours)

Course Description: Students partner with community-based resource people to identify a complex community issue that will serve as the focus for an action research project.

4.2 Development of New Courses

4.3 Updating of Existing Courses

❖ Renaissance Leadership College, University of New Brunswick, Fredericton Campus

- **Effective Citizenship,** RCLP 1062, 2014Winter (3 Credit Hours)

Course Description: The online course address the concepts of citizenship from academic and community-based perspectives. Students will engage with academic theories dealing with cultural citizenship, political community, rights and responsibilities, belonging, immigration, legal status, marginalization and accessibility. The course provides an opportunity for the study and practice of citizenship with reference to topical community issues

❖ Department of Economics, University of New Brunswick, Fredericton Campus

- **Canadian Economic History II,** ECON 3334, 2010WI, (3 Credit Hours)

Course Description: The objective of this course is to consider why the country grew and developed the way it did from Confederation until the latter part of the Twentieth Century. The course is designed to provide students with some sense of academic research in economic history by investigating the long term economic potential and challenges that the Canadian federation and its respective regions faced.

4.4 Effective Use or Development of Teaching Aids and Techniques

Reeves, R. (2013, April). *Constructive Classroom Conversations*. Saint Thomas University, Professional Development. New Brunswick.

Reeves, R. (2012, December). *Professional Grade Conversations: The Processes and Habits of Discourse.* Kaleidoscope Teaching Showcase. University of New Brunswick.

4.5 Involvement in Curriculum Development

Accessible Learning Committee, UNB, 2012-current - Committee Member

4.6 Organization of Field Schools, Labs, or Practice

4.7 a) Direction of Research of Undergraduate or Graduate Studies (identify student name, topic, dates and level -- bachelors, masters, doctorate)
b) External Examiner for Ph.D. Thesis (identify University, date)

4.8 Publication or Production of Books, Articles, Films, etc. that advance teaching effectiveness

4.9 Awards or honours for Teaching

4.10 Any Other Equivalent Accomplishments

SECTION 5: RESEARCH, SCHOLARLY OR CREATIVE ACTIVITY

5.1 Articles Published or Accepted for Publication in Refereed Journals (

Reeves, R. (submitted publication). *What is cross-cultural mentoring? An integrative literature review and discussion of the term cross-cultural mentoring*. International Journal of Coaching and Mentoring.

5.2 Refereed conference proceedings

Reeves, R. (2014, March). *Driving immigrant entrepreneurial success though mentoring: A Discussion of cross-cultural mentoring, program implementation, program design and program management.* 16th National Metropolis Conference Partnering for Success: Facilitating Integration and Inclusion. Hull, Quebec.

Reeves, R. (2013, April). *What is cross-cultural mentoring: An integrative literature analysis and discussion of the term cross-cultural mentoring.* Paper presented at the University of New Brunswick Graduate Research Conference. Fredericton, New Brunswick.

Reeves, R. (2013, April). *Historical roots of collective bargaining among nurses in New Brunswick from the 1960s through to the founding of the New Brunswick Nurses Union in 1978.* Paper presented at the17th Annual Nursing Research Day: Creating a Culture of Scholarship. Fredericton, New Brunswick.

Reeves, R. (2012, October). *Immigrant Inc.: Effective entrepreneur enabling - the mentorship model.* 2012 Mentoring Conference: Facilitating Developmental Relationships for Success. Albuquerque, New Mexico.

Reeves, R. (2012, July). *What is cross-cultural mentoring? An integrative literature review and discussion of the term cross-cultural mentoring.* Atlantic Graduate Student Research Conference. Fredericton, New Brunswick.

Reeves, R. (2012, June). *Immigrant Inc.: Effective entrepreneur enabling. Qualitative* Analysis *Conference*: Cultures of Narrative/Narratives of Culture. St. John's, Newfoundland.

Reeves, R. (2012, March). *Cross-cultural mentoring, emerging findings: Immigrant Entrepreneur Mentorship Programs in New Destination Communities.* International Mentoring Conference, *Impact of Mentoring: Helping Others Reach Their Human Potential.* Orlando, Florida.

Reeves, R (2011, August). *Immigration Inc.: Immigrant entrepreneur mentorship programs in new destination communities.* Metropolis Policy-Research Symposium, *Does 'Place' Matter? Multiculturalism in Atlantic Canada.* Fredericton, New Brunswick

Reeves, R. (2010, June). *The nature of "WE:" How, when and to what extent do adult immigrants taking up residency in New Brunswick engage with both their own and in the more general population?* Conference paper, Canadian Evaluation Society (CES) and Health and Education Research Group (HERG) Conference. Fredericton Campus, University of New Brunswick.

Reeves, R. (2010, March). *Conceptual issues and measurement of inclusion and exclusion of New Brunswick's newest citizens.* Conference paper, 12th National Metropolis Conference, Immigration and Diversity Crossroads of Cultures, Engine of Economic Development. Montréal, Quebec.

Reeves, R. (2009, September). *Women and money: Public Service Labour Relations Act, equal opportunity, and collective bargaining for New Brunswick nurses, 1965-1969.* Poster presented at Re-Connecting with the History of Labour in New Brunswick: Historical Perspectives on Contemporary Issues Conference. Fredericton, NB.

Reeves, R. (2008, May). *Public Service Labour Relations Act: Collective bargaining for New Brunswick nurses by New Brunswick nurses, 1965-1969.* Conference paper, New Brunswick Labour History Workshop. Moncton, NB

Reeves, R. (2008, September). *Public Service Labour Relations Act, Equal Opportunity, and women and organized labour: New Brunswick nurses 1965-1969.* Paper presented at University of New Brunswick-University of Maine International Graduate Student History Conference. Maine, USA

5.3 a) Books
b) Part(s) of Books

Reeves, R. (in press). Factors that foster successful cross-cultural mentoring relationships for immigrant entrepreneurs: An in-depth analysis. In F. Kochan, and A. Green (Eds.), *Uncovering the hidden cultural dynamics in mentoring programs and relationships: Enhancing practice and research.* North Carolina: Information Age Publishing Inc.

5.4 Editorial Responsibilities (include title of book or journal and dates)

5.5 Creative Accomplishments (films, novels, dance choreography, poems, etc.)

5.6 Non-Refereed Publications (Research reports, technical reports, reviews)

Reeves, R. (2009). *Encounter in Japan - a Canadian "gaijin" meets Gonda-shachou.* Royal Ontario Museum, Friends of the Far East (Fall).

Kealey, L. and Reeves R. (2008). *Nursing history in New Brunswick: Making a point making a difference. Info Nursing*, Volume 39, Issue 3, Winter.

5.7 a) Manuscripts submitted
b) Manuscripts in preparation

5.8 Papers Presented at Professional and Technical Meetings (include meeting and paper titles, date and whether invited)

5.9 Presentation of Seminars, Clinics, Workshops (include sponsor and short description of activity)

Reeves, R. (2007, March). *Racing toward an inclusive society.* Autobiographical presentation to provide information to educators, employers and service providers about recognizing and supporting individuals with learning disabilities. University of New Brunswick Disabilities Service Center Conference, Fredericton, NB.

5.10 Consulting Activities, Professional Services to Governmental, Professional and Industrial Associations, Educational Institutions, Granting Agencies, etc.

ADVISORY BOARDS

PROVINCIAL:

- *Welcome to Kindergarten*, 2006–current
  - Welcome to Kindergarten provides preparatory literacy resources and experiences to young New Brunswickers, launched province-wide in 2008. The Welcome Bag distributed at workshops for all New Brunswick children entering kindergarten contains materials and ideas to enable parents and teachers to prepare kids for the start of Kindergarten in the upcoming school year.

BOARD OF DIRECTORS

NATIONAL:

- *The Learning Partnership*. Champions of strong public education, 2007–2013
  - Take Our Kids to Work - Change Your Future - Entrepreneurial Adventure - Canada's Outstanding Principals - Turning Points - Investigate! Invent! Innovate! National Technology - Innovation Awards - Welcome to Kindergarten - Passport to Prosperity - Round on Technology

CORPORATE:

- *Riverside Montessori Leaning Centre*, 2013–current
- *Radiant Learning International School*, India, 2012–current

EVALUATION COMMITTEE

- *Peer-to-Peer Adoption Support Network*, 2012-13
- *Fredericton Chamber of Commerce*, Business Immigrant Mentorship Workshop, 2011

DISTRICT JUDGE

- *New Brunswick Heritage Fare*, 2009, 2010, 2011, 2012, 2013

5.11 Awards (Grants, Contracts, Fellowships) (Identify, date(s), title, agency, amount and duration. For joint awards, the contribution of the candidate should be clearly indicated.)

5.12 Other Evidence of Research Accomplishments (patents, new product development)

5.13 Membership and Active Involvement in Professional and Learned Societies (include offices held, or other responsibilities)

Canadian History Society
International Mentoring Association

5.14 Record of Pursuit of Advanced Degrees and/or Further Academic Study

Feedback that Improves Writing, Teaching & Learning at STU, 2014
Six Practical Strategies to Improve Your Online Course, University Affairs, 2014
An Introduction to Instructional Design, UNB Centre for Teaching and Learning, 2014
Bringing the Outside In: The value of experiential learning, Teaching & Learning at STU, 2013
Using Screencast to Provide Feedback, UNB Centre for Teaching and Learning, 2013
Teaching Time-Savers, UNB Centre for Teaching and Learning, 2013
Time Saving Strategies (Student Feedback), UNB Centre for Teaching and Learning, 2013
How Innovate Forces are Changing Higher Education, DisruptEd Conference, 2013
Atlantic Centre for Qualitative Research, Lecture and Workshop, 2013
CV and How to get Published Workshop, UNB Faculty of Education, 2013
Teaching Showcase: Conversations, Atlantic Association of Universities', 2012
Desire2Learn, Technology and Training Workshop, 2012
Using Images in Instructional Slide Presentations, Summer Teaching Institute, 2012
Visually Effective Data Displays in Instructional Slide Presentations, Summer Teaching Institute, 2012
Presenting Concepts in a Dynamic and Visually Compelling Way, Summer Teaching Institute, 2012
Orientation, UNB Faculty and Instructors, 2012
Teaching Workshop, UNB Center for Teaching and Learning, 2012
Lime Survey Software, 2012

SECTION 6: SERVICE

6.1 Service to the University

- Committees (list level, committee name, dates)

- Administrative Positions (list position, dates)

Professional Development for Faculty

Reeves, R. (2013, April). *Constructive Classroom Conversations*. Saint Thomas University, Professional Development. New Brunswick.

Reeves, R. (2012, December). *Professional Grade Conversations: The Processes and Habits of Discourse.* Kaleidoscope Teaching Showcase. UNB.

Session Chair

Kaleidoscope Teaching Showcase, UNB

University of Maine-University of New Brunswick International Graduate Student Conference, 2006

Committee Member

Accessible Learning Committee, UNB, 2012-current

Review Committee

University of New Brunswick Graduate Research Conference. Fredericton, New Brunswick, 2014

Association of Atlantic Universities Teaching Showcase: Conversations, UNB, 2012

Canadian Association for Curriculum Studies (CACS) for Canadian Society for the Study of Education (CSSE), Congress of the Humanities and Social Sciences, 2011

Renaissance College Intern Presentations, UNB 2012

Liaison

Canadian Society for the Study of Education (CSSE) held in conjunction with the Congress of the Humanities and Social Sciences, 2011

6.2 Service outside the University of scholarly or academic significance

- Community Affairs as a Representative of the University
- Service to Governmental Agencies
- Service to Public or Private Organizations and Companies

Review Committee

Turning Points, Tier 2 Judge. Character development and literacy program for students in Grades 6 - 12 to read, write and think about their fundamental values, 2014.

Mentoring Conference: Facilitating Developmental Relationships for Success, University of New Mexico, 2012 (proposals and conference journal)

Evaluation Committee
Peer-to-Peer Adoption Support Network, 2012-13
Business Immigrant Mentorship Workshop, *Fredericton Chamber of Commerce*, 2011

SECTION 7: OTHER RELEVANT INFORMATION

SPEAKER (selected)

- *Entrepreneurial Adventure,* New Brunswick Provincial Show Case, 2013
- *Turning Point*, 2013
- *New Brunswick Learning Disabilities Association*, 'The Future is in the Margins,' 2013
- Atlantic Symposium
- Alzheimer's *Society of New Brunswick*. 'Learning in Tough Times,' 2011
- *Literacy Coalition of New Brunswick and Frontier College*, Family Fun Day, 2011
- *New Brunswick Literacy Coalition*, Sheree Fitch Learner Scholarships Award, 2010
- *Literacy Coalition of New Brunswick*, 'I Have Disabilities, So What? Now, Help Me Learn!' 2010
- *Entrepreneurial Adventure*, 'The Future is YOU: Own it!' 2010
- *International Women's Day*. Fredericton, 2010
- *Women in Business*. Saint John Board of Trade, 2009
- *New Brunswick Credit Union*, 'New Brunswick Credit Unions: A Significant History' AGM, 2008
- *Born to Read's 10th Anniversary*, 'Born to Read,' 2008

MC (selected)

- *Celebrating Public Education Tribute Luncheon*, Honoree, Honourable Marilyn Trenholme Counsell; Guest Speaker, Justin Trudeau. Moncton, New Brunswick, 2009
- *New Brunswick Adoption Foundation*, 'Home is where the HeART is' charity auction, 2009
- *New Brunswick Alzheimer's Society,* 2010

FUNDRAISING (selected)
CHAIR:

- *New Brunswick Adoption Foundation*, 'Home is where the HeART is' charity auction, 2009
  (Co-Chair Hon. Jim Ross)
- *Fredericton Arts and Learning Inc.,* Harvest Ball, 2005
- *Fredericton Arts and Learning Inc.,* Spring Spritzer, 2004

- *New Brunswick Crafts Council,* 20th Annual New Brunswick Fine Craft Festival, 1998
- Kobe Earthquake Fund, 1995

COMMITTEE MEMBER

- *New Brunswick Adoption Foundation*, 'Home is where the HeART is' charity auction, 2010, 2011, 2012, 2013.
- Celebrating Public Education Tribute Luncheon
  - Gerry Pond, Honoree; Hon. Frank McKenna, Guest Speaker, 2013
  - Hon. Jim Ross, Honoree; Hon. Brian Mulroney Guest Speaker, 2012
  - Bernard Lord, Honoree, 2011
  - Hon. Marilyn Trenholme Counsell, Honoree; Justin Trudeau, Guest Speaker, 2009

BOARD OF DIRECTORS

PROVINCIAL/PREFECTURE:

- *New Brunswick Adoption Foundation,* Vice-Chair, 2009–current
- *New Brunswick Adoption Foundation*, Director 2008
- *Japanese Cross Cultural Exchange Association*, Chair, Japan, 1995–1996
  - Arranged various tours and seminars including the introduction of members to Former President Gorbachev and other Nobel Prize winners.
  - Supported new foreigners to Japan on relocation issues, including housing, physicians, dentists, culturally sensitive issues, acquiring visas, and permits
- *Nagoya International Club*, Japan, 1994–1997

LOCAL:

- *Charlotte Street Centre* (Fredericton Arts and Learning Inc.,). New Brunswick, 2003–2006
  - Procured and renovated the Charlotte Street School in Downtown Fredericton into an arts and learning centre.
  - The first $888,000 phase of the project was completed in 2005; the Centre continues to operate with a 100% occupancy rate.

ADVISORY BOARDS/HONORARY CHAIRS

PROVINCIAL:

- *Canadian Deafblind Association*, 2006–current
- *Centre Culturel Aberdeen.* For a contemporary and urban vision of Acadie. Capital Campaign, (Co-Chair, Bernard Imbeault) Moncton, New Brunswick, 2010–2011

- *Muriel McQueen Fergusson Foundation for Family Violence Research.* Gala Dinner, "Following in Muriel's Footsteps: Driving Social Change." Guest Speaker, Margot Franssen, O.C. Fredericton, New Brunswick, 2009
- *Maritime High School Ringette*, 2008–2010
- *Born to Read / Le Gout de Lire*, 2007–2010
    - Since its inception it has provided books to more than 90 thousand New Brunswick children and their families.