

Coach Succession Planning Support  
 Confidence Teacher Learning  
 Personal Communication Learning  
 Collaborative McMaster University Environment  
 Supportive Reciprocal University  
 Opportunities Understanding Mentorship  
 Role Creativity TMG Planning  
 Transition Career Innovation  
 Succession Counselor TMG Development  
 Self Growth  
 McMaster

# TMG MENTORSHIP PROGRAM

at McMaster University



## CALM PROGRAM 2011

Mac 'n Change

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McMaster  
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# 1. INTRODUCTION

The University work environment provides unique challenges for new employees to fully integrate their experience and expertise with the needs of the University. These challenges are further exacerbated during a period of change in a University environment. The anticipated departure of senior staff that have extensive knowledge of University processes, experience, acumen, policy and procedures due to upcoming retirements, emphasizes the importance of support and knowledge transfer to the management staff who will be called to fill the vacant positions.

The Mentoring program is the new vehicle for the transfer of current best practices, knowledge and organizational history from experienced managers to new managers. This program will provide an easy to access program that provides real-time and confidential support for managing daily challenges and a bridge to a thorough and accelerated understanding of the University environment.

# 2. TARGET GROUPS

**Mentees:** Members of the TMG at McMaster University

**Mentors:** Senior Management, Senior TMG, Other administrators with over 3 years of management experience within McMaster University

# 3. MENTORING PROGRAMS

Mentorship has been defined simply as two people (Mentor & Mentee) with common interests and differing experience, working together to further the interests of the mentee. This definition has evolved. While it is often informal and occurs without organization wide endorsement or support, increasingly mentorship is being recognized as a strategy to achieve excellence in organizations. Recently a survey conducted by Fortune Magazine found that 76% of Fortune 500 companies in the Top 25 had mentoring programs.

The reason stems from the support the new employee receives integrating into a new environment and the residual benefit the mentor obtains by getting a fresh perspective from new staff and a sense of empowerment that their experience is being recognized. The net result has been a 78% increase in management productivity vs. organizations who just provide training alone (American Society of Training and Development ASTD).

This may occur in many forms and many different methodologies have been used. Here is a summary of the most common types and techniques used:

## TYPES OF MENTORING PROGRAMS:

- Peer-to-Peer – One employee of similar standing mentoring another of similar standing.
- Traditional One-on-One – One experienced employee to new employee.
- E- Mentoring – Mentoring via e-mail and the internet using group, traditional or team structures.
- Team Mentoring – Several experienced employees working with small groups of new employees, in which the experienced-to-new employee’s ratio is not greater than 1:4.
- Group Mentoring – One experienced employee to up to four new employees.

## MENTORING TECHNIQUES:

**A 1995 study (Aubrey & Cohen) of mentoring techniques most commonly used in business found that the five most commonly used techniques among mentors were:**

1. Accompanying: making a commitment in a caring way, which involves taking part in the learning process side-by-side with the learner.
2. Sowing: mentors are often confronted with the difficulty of preparing the learner before he or she is ready to change. Sowing is necessary when you know that what you say may not be understood or even acceptable to learners at first but will make sense and have value to the mentee when the situation requires it.
3. Catalyzing: when change reaches a critical level of pressure, learning can jump. Here the mentor chooses to plunge the learner right into change, provoking a different way of thinking, a change in identity or a re-ordering of values.
4. Showing: this is making something understandable, or using your own example to demonstrate a skill or activity. You show what you are talking about, you show by your own behavior.
5. Harvesting: here the mentor focuses on “picking the ripe fruit”: it is usually learned to create awareness of what was learned by experience and to draw conclusions. The key questions here are: “What have you learned?”, “How useful is it?”

Each of these techniques is important considerations when developing Mentoring Programs to meet the specific goals of the organization. Often, there is a blend of the aforementioned techniques utilized to optimize the experience of both the mentee and the mentor in meeting the goals of a Mentorship Program at McMaster University.

## MENTORING PROGRAMS

There are excellent examples of Mentoring Programs throughout Canada and the United States. One such example is the MENTOR/National Mentoring Partnership based in Alexandria, Virginia, USA. The designers of this program emphasize the importance of the mentorship relationship and have identified guidelines and tool kits to help other groups get started and sustain successful mentorship programs. They emphasize the importance of a commitment to the program from all stakeholders. When those members who participate in a Mentorship relationship are well supported the entire organization benefits.

The Ontario Oncology Advanced Practice Nursing (APN) Interprofessional e-Mentorship Program is an example of a funded, well-received, successful e-mentoring program. This program was designed to support knowledge transfer in a highly specialized field (oncology nursing), it relies on the commitment of both the participants and the management team. The unique use of the e-mentoring model allows APN in the field of oncology to support one another provincially and nationally.

Aubrey, Bob and Cohen, Paul (1995). *Working Wisdom: Timeless Skills and Vanguard Strategies for Learning Organizations*. Jossey Bass. pp. 23, 44–47, 96–97.

Manza,G. & Wiley,T. (2005). *How to build a successful mentoring program using the elements of effective practice*. MENTOR/ National Mentoring Partnership.

[www.mentoring.org/eeptoolkit](http://www.mentoring.org/eeptoolkit)

**RECOMMENDATION:** It is our recommendation that the mentoring program be designed to have multiple platforms. The primary focus will be the personal relationship whereby the experienced employee mentors the new employee. This relationship would be supported by an on-line component which will provide a framework for the mentoring relationship as well as the resources to assist both parties in the ongoing development and evaluation of the mentoring relationship.

Thus this mentoring program will be designed for the mentee-mentor to meet predominantly face-to-face interactions with resources being available online.

## 4. NATURE OF MENTORING SESSIONS

The design of the mentoring sessions will vary depending on the needs and physical location of the parties involved. For the most part, every effort will be made to ensure that meetings take place, especially in the early stages of the mentoring relationship. It is important that the individuals have the opportunity to meet and get to know one another to aid in the development of a rapport and also to determine whether the mentoring pair is compatible. This is something that may be more difficult to establish via other means.

As the mentoring relationship builds, alternative methods of communication will naturally be used as they are often more convenient. Parties can communicate over the telephone, via email and by using other technologies. This variety of communication methods will be necessary, to accommodate the work life of both the mentor and the mentee.

Some mentoring relationships will not have the option of face to face, personal meetings due to distance between locations. For these types of mentoring relationships, e-mentoring is an alternative. This will consist of a variety of electronic methods including email, phone, Skype or other conferencing methods. A forum for establishing an e-mentoring segment of the program may be beneficial to accommodate and be inclusive to the needs of some participants.

Overall, the mentorship program will operate on a flexible basis using a variety of communication methods and structures which meet the needs of the participants. A commitment to dedicate time and effort as necessary to facilitate the mentoring relationship will be emphasized for both mentors and mentees who agree to participate in the program.

## 5. IMPLEMENTATION OF THE MENTORING PROGRAM

### Timeline:

- Pilot mentoring program – April – June 2011
- Phase I Implementation – September 2011
- Phase II Implementation – September 2012

**Pilot:** A pilot program is being implemented to test out our recruitment forms, agreements and feedback reports. This pilot will also be used to develop an orientation and training session. This will be completed by May 1st, 2011.

We anticipate having initial feedback by June 23, 2011. We are working with CCE to assist with recruitment and input for training and orientation development.

**Phase I Implementation:** We propose to further collaborate with the CCE and expand Phase I to the NMOP participants of the fall of 2011 (mentees) and CALM cohorts (mentees and mentors). Discussions have been held with CCE and we propose to include mentoring in the modules of both NMOP and CALM. At this stage we will also include any other SMT to participate. During this Phase we also will implement the web platform described in Section 10 and provide standardized training and orientation.

**Phase II Implementation:** Upon evaluation of Phase I from feedback received, the next phase of the mentorship program will be rolled out to any new managers at McMaster and any mentors as described in the target groups.

The Program is recruiting Champions and has recruited several Champions to date. Champions are being recruited from different areas and Faculties. Obtaining buy-in and participation by the University President to promote and stimulate people development and mentoring with his Senior Managers is one of our goals.

Human Resources has expressed great interest and we propose to further involve Career Services and HR senior Management.

## 6. GUIDELINES

### Mentorship Guidelines

#### **Mentee:**

Why a Mentee?

- Skills and career development
- Support
- Anticipate and avoid common errors
- Access to an alternative source of knowledge
- Self/peer review
- Identify personal development needs/goals
- Opportunity to learn

#### **Expectations of a Mentee:**

- Proactive in the relationship
- Listen and be honest and be prepared
- Identify individual learning needs
- Seek and complete learning experiences
- Learn from experiences and improve practice to become an expert
- Seek performance feedback from the mentor and be receptive to feedback and coaching regularly
- Provide frequent feedback to mentor regarding progress and mentor effectiveness
- Use the mentor as a model for professional development
- Use the mentor as a model for personal development
- Evaluate own performance based on goals and expectations of learning plan honestly and constructively
- Participate in evaluation of the mentor program

**Mentor:** "Wisdom can neither be bought nor sold. But it can be shared." (Grainger, 2002)

Why a mentor?

- Enhanced self esteem
- Personal satisfaction
- Recognition
- Extension of organizational influence
- Fulfillment of personal development needs

### **Expectations of a Mentor: Role Model:**

- Demonstrate and personify skill and competence in personal, professional and career matters
- Model ethical and professional behavior
- Exhibit and support effective communication strategies
- Committed to self-learning and learning of others
- Support and encourage mentee learning on an ongoing basis

### **Networking:**

- Facilitate in the socialization of the mentee into their role through a collaborative collegial relationship
- Orient mentee to the culture and value systems of the University
- Help identify resources for learning

### **Coach and Counselor:**

- Discuss expectations of the relationship with the mentee at the beginning. Establish mutually agreed intended outcomes (\*Mentorship Agreement)
- Set an agenda/timetable for meeting, working and learning
- Provide a safe environment for mentee to critically reflect on his/her personal and professional capabilities
- Build a trust relationship
- Encourage creativity and risk taking in learning and practicing
- Assist the mentee to learn through their accomplishments and challenges
- Share experiences (both good and bad)
- Recognize and support the mentee's strengths and areas to be developed
- Develop capabilities by offering constructive feedback
- Evaluate own effectiveness as mentor

## 7. STAKEHOLDERS

It is of the utmost importance to have all parties represented and involved in the mentorship program.

**Senior Management Team:** McMaster's Senior Management Team (SMT) are the decision makers, who can allocate funding and champion the program. An interest from SMT will produce great benefit to creating a leadership pipeline to develop and use this program for succession planning. SMT champions can assist in promoting the mentorship program and actively seeking buy-in. SMT within Human Resources and the academics areas should be actively involved as their participation in maintaining the Mentorship Program and can aid in succession planning. It would be encouraged that they in turn recruit other SMT including Deans of the various Faculties. Since the University is immensely diverse, a broad network that touches all groups with representation by a member of SMT is crucial.

**The Management Group (TMG):** TMG group will be the first target group. TMG engagement will also tie in with Human Resources, career planning for succession planning and professional development. Mentorship will support TMG engagement into the University setting when the experience is in real-time and related to real-life interactions and knowledge transfer. Actively getting TMG involved and aware of career opportunities and sharing the commitment and responsibility for their advancement is a key outcome and reward of the Mentorship Program.



## 8. PROMOTION OF THE PROGRAM

Promotion of the program will be very important. This is an opportunity to help the University build and strengthen relationships with employees and promote employee development. The launch of the Mentorship Program can be the starting point for such engagement.

McMaster University can (re)position itself by initiating a campaign that attracts the best education experts and researchers in Canada while simultaneously establishing itself as a leader in the development of the priority asset of the organization: its people. Promoting this strength on the world-wide stage will introduce and remind our colleagues everywhere that McMaster University is a great place to learn and work.

Once the program is ready for launch, the Mentorship Advisory Committee will work with the communications team to promote the Mentorship Program on the Daily News, the McMaster Website, other McMaster publications as well as local newspapers. The Champions of this Program including the President, can launch a themed campaign, for example, “the New Way of Learning”, that promotes learning together and values employees. This campaign will emphasize that McMaster is investing people and thus, strengthening the future of the University. The Mentorship Program can be the flagship of this new initiative or Campaign.

A web-based platform for an on-line Mentorship program, housed at the [working@mcmaster](mailto:working@mcmaster) website is included in the proposal. We further propose a Twitter feed as well as a Facebook page to be included on the platform. The website can further be expanded to host a discussion board, or a blog of a mentor/mentee progression.

## 9. MANAGEMENT OF THE PROGRAM

### **TMG Mentorship Project Committee:**

We recommend the establishment of an advisory committee to oversee implementation of the Mentorship Program for ongoing support and guidance. Without an advisory board, the project is at risk of not being implemented or sustained.

The advisory board should be comprised of the following key stakeholders:

- Director of Human Resources
- Program Manager Continuing Education Services; and
- Two TMG representatives.

This new committee is critical for the first 1-2 years of the program. At this point we do not see the existing TMG Rewards Committee as ready for the oversight responsibility of this program. As the TMG Rewards Committee group's role expands and becomes well-established, the suitability of the oversight responsibility of the mentorship programs could be re-evaluated.

### **Human Resources:**

Our research indicates that the most suitable area for placement of this program is in the department of Human Resources. The overall responsibility for employee engagement rests there as well as the knowledge base and training of TMG. We believe Human Resources will need to work closely with CCE in establishing this program and with ongoing delivery of training/orientation sessions for mentors and mentees.

Ongoing support from an HR specialist will be required for overall coordination of the final developed program. Responsibilities will include overseeing mentor/mentee relations, coordinating web platform updates, and responses to questions. It is expected .40 of an FTE will be required to perform these tasks.

## 10. FINANCIAL PLAN

### Pilot:

Training and Orientation session for pilot groups, materials (\$100); room rental 1.5 hours (\$50); snacks or lunch for 10 participants (\$250)

Completed May 2011

### One-time Start-Up Costs:

Initial one-time costs are as follows:

i) Set up web platform:

- Develop an on-line mentorship platform
- This platform will:
  - » allow mentors and mentees to sign-up on-line for the program
  - » automate matching of mentors and mentees; and
  - » enable online completion of ongoing evaluation forms/surveys
  - » Refer to Appendix E for a detailed quote (\$13,620 plus taxes)

ii) Develop a formal Mentorship orientation and training program:

- CCE would coordinate the development of the mentor training program;
- CCE has estimated the cost to develop a mentee/mentor training session at:
  - » \$2,500 for a ½ day and
  - » \$5,000 for a full day training session

### Annual Ongoing Costs:

i) Human Resource Support

- Oversee the management of the program, including consultation with mentors and mentees, attendance at mentoring/mentor networking meetings, maintenance of website.
- Time involved is estimated at 40% of a human resource specialist FTE.
- Project estimate: \$36,000 per year (based on 40% of an estimated salary & benefit cost of \$90,000).

## **ii) Mentor training**

- A CCE delivered program to run twice a year
- CCE has estimated the cost to deliver a mentor training session
  - » The estimate is based on 12-15 participants and includes instruction, materials and catering
  - » \$3,000 for half day
  - » \$4,900 for a full day
  - » Additional participants would be at a per person cost for materials and catering
- Project estimate: \$6,000 (2 half day orientation sessions per year at \$3,000/session)

## **iii) Web support**

- Annual support of on-line mentorship platform, \$750/yr server architecture plus \$1,000/yr for maintenance and taxes
- Refer to Appendix E for additional information and quote
- Project estimate: \$1,750

## **iv) Promotional costs**

- Costs to advertise the program
- Project estimate: \$1,000

## **v) Other supplies and expense**

- Meet and greet costs with mentees and mentors
- Project estimate: \$1,000

# TMG MENTORSHIP PROGRAM

## Three Year Budget

For the Fiscal Years 2011/12 to 2013/14

	2011/12	2012/13	2013/14
	Total Budget	Total Budget	Total Budget
1 Support Salaries & Benefits			
Support Salaries-Part-time	25,000	25,000	25,000
Support Benefits-Part-time	11,000	11,000	11,000
<b>Total</b>	<b>36,000</b>	<b>36,000</b>	<b>36,000</b>
2. Non-Salary Expenses			
Build/Support web platform	15,000	1,750	1,750
Develop mentor training	2,500	-	-
Deliver mentor/mentee training	6,000	6,000	6,000
Promotional costs	1,000	1,000	1,000
Other supplies and expenses	1,000	1,000	1,000
<b>Total - Non-salary Expenses</b>	<b>25,500</b>	<b>9,750</b>	<b>9,750</b>
<b>Total Expenses</b>	<b>61,500</b>	<b>45,750</b>	<b>45,750</b>

## 11. ANTICIPATED OUTCOMES AND EVALUATION (SEE APPENDIX D)

Successful mentoring relationships depend on people. Fostering a mutually beneficial partnership has far reaching advantages for both the mentor and the mentee. Research indicates that 'having a good mentor early in one's career can mean the difference between success and failure in any career' (Lee, Dennis & Campbell, 2007).

The sense that the commitment to the mentor/mentee partnership is too much for busy schedules is found to be unrealistic. While it is essential that there be a commitment to the partnership in both time and energy, those who have participated in mentoring programs report that 'those who are good mentors get incalculably more out of it than they put into it'.

Ongoing evaluation of the mentoring partnership and the Mentoring Program is essential. There is a significant investment in expertise, time and energy which cannot be taken for granted or misused. The goals of the program and the partnership should be revisited regularly to ensure that the partnership remains effective and advances the focus and goals of the university while also supporting the career and personal objectives of those participating in the program.

The establishment and growth of the Mentorship Program will ensure that new management staff are acquiring the expertise from their mentors at the mid and senior leadership levels. The succession planning of any organization involves the purposeful and committed transfer of knowledge inherent in the experienced people to the new and developing team. The strength of the team grows exponentially as a direct result of knowledge sharing and knowledge transfer from one to another. This investment in people and a focus on succession planning through a Mentorship Program will work to ensure that McMaster University remains on a continuum of success.

## APPENDIX A - MENTEE APPLICATION

This mentoring program is offered to staff, administrative and academic leaders in all departments within McMaster University. To ensure the best possible experience for our participants, we require that Mentees:

- » participate in an orientation session
- » sign the 12 months Mentoring Agreement
- » provide an evaluation upon completion of the 12 month time period
- » disclose any conflict of interest
- » respect confidentiality outline in the Mentoring Agreement

**Please complete the following:**

Name	Employee Number
Position	Department
Extension	Email Address

**What are you hoping to gain from participating on this mentoring program (check as appropriate?)**

- » Organizational Knowledge
- » Career development
- » Networking
- » Leadership
- » Skill development (please specify \_\_\_\_\_)
- » Knowledge (please specify \_\_\_\_\_)
- » Other

**Who would you like to have as a mentor?**

<b>Name (may leave blank)</b>	<b>Department</b>	
Reason for choice/skill set.		
<b>Name (may leave blank)</b>	<b>Department</b>	
Reason for choice/skill set.		

## APPENDIX B – MENTOR APPLICATION

This mentoring program is offered to staff, administrative and academic leaders in all departments within McMaster University. To ensure the best possible experience for our participants, we require that mentees:

- » participate in an orientation session
- » sign the 12 months Mentoring Agreement
- » provide an evaluation upon completion of the 12 month time period
- » disclose any conflict of interest
- » respect confidentiality outline in the Mentoring Agreement

Please complete the following:

Name	Employee Number
Position	Department
Extension	Email Address

What strengths/expertise can you bring to a mentoring relationship (check as appropriate?)

- » Organizational Knowledge
- » Career development
- » Networking
- » Leadership
- » Skill development (please specify \_\_\_\_\_)
- » Knowledge (please specify \_\_\_\_\_)
- » Other

Please provide a description of the strengths and expertise that you could bring to the Mentoring relationship.

## APPENDIX C – MENTORING AGREEMENT

An effective way to acknowledge the commitments by both the mentees and the mentor is to construct a clear understanding which outlines the commitments of both the mentee and the mentor. This can be used for any aspect of the mentoring relationship. By developing this together, there is evidence of a mutually beneficial relationship. Please complete the following during your initial meeting and make a copy for each of you.

Mentor Name: \_\_\_\_\_ Date: \_\_\_\_\_

Mentee Name: \_\_\_\_\_ Date: \_\_\_\_\_

- We are voluntarily entering into this partnership
- We wish this to be a rewarding experience
- We agree that the Mentoring relationship will last for \_\_\_\_ months
- We will meet at least once every \_\_\_\_ weeks in a mutually agreed location (pre-determined and agreed to)
- We agreed that meeting times will not be cancelled unless unavoidable. At the end of each meeting, we will agree on a date for the next meeting
- We plan our meetings to typically last \_\_\_\_ minutes
- We agree that contact in between meetings is (i.e., frequency & modality i.e.: email/Skype/phone) \_\_\_\_\_
- We will put interruptions aside during our meetings
- We will make an effort to openly discuss any challenges in the mentoring relationship
- The Mentoring relationship will be evaluated every three to six months and will end by amicable agreement once we have achieved as much as possible
- If, at any time, we decide that the relationship is not progressing, we agree to withdraw from the mentoring relationship

**Our goals are:**

Note: Please be SMART (Specific-Measurable-Actionable-Realistic-Timely)

**Confidentiality Agreement:**

We agree that anything discussed in the meetings will remain confidential unless otherwise specified. We agree to disclose any conflict of interest as per McMaster’s Conflict of Interest Policy and Procedure for Disclosing and Assessing Conflicts of Interest. \*Conflict of Interest policies. We also agree that if any problems develop, we will seek the support of Human Resources.

**Signatures:**

Mentor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Mentee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## APPENDIX D – MENTORING EVALUATION

Your evaluation is our most valuable tool for assessing effectiveness and planning for future mentoring relationships. We appreciate any feedback you want to give us about your experience in the mentoring program or suggestions for improvement. Your responses will remain confidential.

1. Please identify your role in the relationship:
  - i. \_\_\_ Mentor \_\_\_ Mentee
  
2. Please identify the timeframe of your Mentoring Agreement:
  - a. Approximate start date: (Day) \_\_\_\_\_ (Month) \_\_\_\_\_ (Year) \_\_\_\_\_
  - b. Approximate finish date: (Day) \_\_\_\_\_ (Month) \_\_\_\_\_ (Year) \_\_\_\_\_
  
3. What motivated you to come to this program?
  
4. What personal/professional objectives did you hope to achieve during the program?
  
5. Where these objectives met? Why or why not? (comments)
  
6. About how often did you meet for mentoring sessions?
  - i. \_\_\_ Weekly
  - ii. \_\_\_ Bi-Weekly
  - iii. \_\_\_ Monthly
  - iv. \_\_\_ Infrequently \_\_\_\_\_

7. Where these sessions long enough?

8. About how often were you in contact (not necessarily a scheduled meeting) during the program?

- i.  Daily
- ii.  Weekly
- iii.  Monthly
- iv.  Infrequently \_\_\_\_\_

9. What were the most common forms of contact you had with your partner?

- v.  Scheduled meetings
- vi.  Phone Calls
- vii.  Unscheduled meetings
- viii.  Email
- ix.  Skype
- x.  Other (specify) \_\_\_\_\_

10. How useful was the support and training offered for your role?

- a. Pre-program Orientation
  - i. Not at all useful 1      2      3      4      5 Very useful
- b. Mentor/Mentee Orientation
  - i. Not at all useful 1      2      3      4      5 Very useful
- c. Mentoring Principles Handouts
  - i. Not at all useful 1      2      3      4      5 Very useful
- d. Mentoring Books/Resources
  - i. Not at all useful 1      2      3      4      5 Very useful
- e. Mentoring Agreement Template
  - i. Not at all useful 1      2      3      4      5 Very useful
- f. Mentoring Website
  - i. Not at all useful 1      2      3      4      5 Very useful
- g. Program facilitation (HR)
  - i. Not at all useful 1      2      3      4      5 Very useful

**Comments:**

How did you hear about this Mentoring Program?

What was the most valuable aspect of this program?

What was the least beneficial aspect of this program?

Could this program have been more effective? If so, in what way?

Additional Comments:

# APPENDIX E – MENTORSHIP ONLINE PROJECT PROPOSAL - CSU

Prepared March 16th, 2011

## Global considerations for this project:

The online mentorship platform is based on 3 primary functions:

1. The ability to push mail to all members of the site (mailing Lists)
2. The ability for users to search for mentors by selecting from a list of predefined qualities mentors have selected in their profiles, and view the associated profiles
3. Ability for users to provide online feedback in survey format

In addition the site must accommodate downloadable fillable PDF forms, an admin only online calendar, and user logins. The CSU recommends a base content management system with a customized user matching component for the 2nd item. The CSU recommends the Joomla! CMS as a development platform

## 2.0 Server Architecture & Website

### 2.1 Exemptions.

2.1.1 The client is responsible for uploading/adding members. Each entry must include firstname, lastname, and email address at a minimum.

2.1.2 Any custom components must be scanned by UTS before being accessible from the public internet. CSU will assist in securing security clearance.

### 2.2 Deliverables.

2.2.1 RHEL Linux environment with Apache, PHP, and MySQL Compiled.

2.2.2 100GB (Raw) storage Space (Total accessible space will be smaller due to overhead, OS, and installed applications).

2.2.3 CSU will provision 1 Joomla 1.5 installation, with McMaster branding. This installation will be the latest version as of the date of signing.

2.2.4 CSU will install document management plugins into the base system. This will allow for nested document management (Upload, storage, publication, etc.) for fillable PDF forms.

2.2.5 CSU will provide a system mailer that will mail all members of the site.

2.2.6 CSU will provision a limesurvey or BF pro online survey for user feedback. This will be a 2nd system integrated into the main site. The client will be allowed to choose which suits their needs.

2.2.7 CSU will install an admin only online calendar for organization. This calendar will be manual, and will not provide any automated notices or reminders.

2.2.8 CSU will author and install a custom user matching component. This component will allow mentors to create profiles and choose from a prepared list of qualities, and provide a brief bio. Users will be able to search based ONLY on those prepared qualities, and a list of matches will be provided with links to the bios. All communication between users will go through the administration, no direct communication will be facilitated.

2.2.9 CSU will register one available subdomain (<http://xyyyz.mcmaster.ca>) and attach it to the system.

2.2.10 CSU will provide 1 hour of training with the system to admin staff on system administration.



## 3.0 Monthly Maintenance & Support

### 3.1 Exemptions.

3.1.1 This maintenance agreement does not provide support for end users of any of the above systems. The CSU strongly recommends an end user support plan for any online system.

3.1.2 All Clients must read and accept the CSU server service level agreement.

3.1.3 CSU provides server maintenance as listed in item.

3.2.1. If additional services are required for any listed services they are billed at the CSU standard Level 3 discounted rate of 50.00 per hour.

### 3.2 Deliverables.

3.2.1 Level 3 Support package as detailed at [www.csu.mcmaster.ca](http://www.csu.mcmaster.ca) for year one which includes:

3.2.1.1 Five week backup rotation.

3.2.1.2 Site security/Firewall.

3.2.1.3 Emergency Power.

3.2.1.4 McMaster Network Connection.

3.2.1.5 Anti-virus software with managed updates.

3.2.1.6 Operating System Updates.

3.2.1.7 File Restores.

3.2.1.8 Server Monitoring.

3.2.1.9 Application Installation and Updates (security patches).

3.2.1.10 User Management.

3.2.1.11 Log Monitoring.

3.2.1.12 Monthly reports.

Project Costs & Delivery Date:

Completion: TBD at signing

<b>Item</b>	<b>Year 1</b>	<b>Yearly (years 2-5)</b>
1. Server Architecture (2.2.1-2.2.2)	4250.00	750/year
2. Website Development (2.2.3-2.2.10) i. Joomla Installation & Branding (10) ii. Component Development (30) iii. Survey System (2) iv. User Management & Mail System (3) v. Testing & Security Clearance (10) vi. Training, PM, & Process Mapping (10) Total – 65 Hours	6370.00	--
3. Maintenance & Support	3000.00	Customers Option
<b>Total:</b>	13620 + Taxes	750 + Maintenance & Taxes
<p>Notes: 1. 30% down, 30% at mid-project review, balance at project close. 2. Item 2 is based on best estimates. Should additional time be required to meet all deliverables, the client will be responsible for the additional costs at the standard CSU rate of 98/hour. 3. This quotation is good for 90 days from date of preparation.</p>		

# APPENDIX F – PILOT PROJECT REPORT

## Pilot Program Report

The University work environment provides unique challenges for new employees to fully integrate their experience and expertise with the needs of the University. These challenges are further exacerbated during a period of change in a University environment. The anticipated departure of senior staff that have extensive knowledge of University process, experience, acumen, policy and procedure due to upcoming retirements, emphasizes the importance of support and knowledge transfer to the management staff who will be called to fill the vacant positions.

The Mentoring program is the new vehicle for the transfer of current best practices, knowledge and organizational history from experienced managers to new managers. This program will provide an easy to access program that provides real-time and confidential support for managing daily challenges and a bridge to a thorough and accelerated understanding of the University environment.

## The Pilot Project

The team decided that while we all understood the value of personal and career mentorship, we would need to ‘test’ our idea in the university community to see if our ideas worked. This meant that we needed to:

- identify mentors & mentees,
- ensure privacy
- evaluate the effectiveness (or not) of a mentor/mentee relationship.

After much discussion, a literature search for current practice/like models and brainstorming and concept mapping, we developed the model for the McMaster Mentoring Program.

# MODEL OF THE PILOT PROJECT

Developing the model required various steps to answer the following questions:

## **Who are the Mentees?**

McMaster University is the sponsor and host of the New Managers Orientation Program. This program involves new managers and introduces them to various aspects of university acumen including McMaster's mission and vision statements, team building, human resource etc. True to its name, this program is offered to new managers and hence, potential mentees. The introduction of this project to the NMOP attendees was done at one of the scheduled classes. A survey done of the 11 participants identified 9 who were in favour of participating in a Mentor-Mentee relationship and would consider taking part in the Pilot Project.

## **Who are the Mentors?**

Identification of the Mentors required a brainstorming session during which the team identified leaders at McMaster who had extensive knowledge of the University and had a significant history with McMaster. Additionally, careful consideration was taken to ensure that the Mentor pool was representative of the various programs, schools and departments at the University. The team identified 15 potential Mentors from within the Senior Management Team. Each Senior Manager was approached by a member of the Mac 'n Change Team and introduced to the project and asked if they were interested and had time to commit to a short term pilot project. The response was overwhelmingly positive.

## **Identification of goals and objectives of the Mentor-Mentee relationship.**

The literature search was informative especially with regard to current practice, previously established mentor programs and world-wide information related to the mentoring experience. It became acutely apparent that the early identification of goals was paramount in the success of the Mentor-Mentee relationship. As well, the establishment of guidelines, supports and resources was also important. To that end, the Mac 'n Change Team developed the application documents. These documents offered suggestions related to specific topics, interests and goals for the participants. This information was essential to support successful and pertinent matching of Mentors to Mentees.

## Matching

Upon receipt of applications from our mentors and mentees, we were able to match 4 groups. In order to match the mentors with mentees, we adopted guidelines which included:

- consideration of the details, descriptions and goals identified on the application forms
- align the Mentor's goals with the Mentee goals
- consider the similar schools/departments
- cognizant of potential conflict issues
- maintained that this relationship be Mentee driven

Following an open and honest discussion amongst the Mac 'n Change Team members whereby all of the above guidelines were considered, we unanimously agreed to the matching of mentor to mentee. Each partnership was assigned a liaison person whose responsibility it was to connect the mentor to the mentee. This could be achieved through email, voicemail or face-to-face contact. The liaison person was to be available for followup, questions and information as necessary.

## Meetings

For the purposes of the pilot project, each of the participants was invited to come to an orientation session where members of the Mentoring Program Team would describe the project and outline the expectations for the participants. To this end, an orientation manual was developed and a presentation (and lunch was served). Theoretically, this was (is) a great idea but the team did not fully appreciate the scheduling issues of both the Mentors and the Mentees. Flexibility was required and the Team decided that it was important that each liaison person make direct contact with both the Mentor & the Mentee. The goal was that the Mentors and Mentees would meet weekly/bi-weekly for the first 4-6 weeks.

## Evaluation

The development of the evaluation tool reflected the expectations of the Team that Mentors and Mentees would meet weekly for 4-6 weeks. The evaluation tool would be at the 2 week mark and the end of the pilot. Along with the completion of the evaluation tool, the liaison team member would acquire informal feedback about the process, the success (or non-success) of the matching and any progress to date. The information obtained from these sources would dictate any necessary changes in the method and strength the model as the Program progressed into Phase 2.

## Results

All teams have met at least once.

The frequency of the meetings between the Mentors & Mentees was not weekly but rather as indicated. Face to face meetings were essential, at least for the first meeting.

Communication via email, phone or face to face was negotiated in each partnership.

The feedback from the Mentors & Mentees has been all positive.

## Lessons learned from the evaluations include:

1. The expectations of career development are different and the same as expected. In some cases, the expertise of the senior management was important to help the new manager prioritize their goals. This prioritizing was not limited to career but to personal and professional as well.
2. The networking/getting to know one another is really important for new staff/new managers within the organization. Understanding that the organization is very big and has many facets of expertise and learning, the ability to 'know someone' within this complex environment provides the new manager with the sense that they are not alone but rather, an important contributor to the ongoing workings & success of McMaster University.
3. Liaising with the Mentor/Mentees was an important part of the process. Knowing that there was an expectation of commitment to meet and support each other, from both the Mentor and the Mentee, encouraged each other to be proactive and negotiate future meetings/contact times. Reminders to one another were okay and welcome.
4. All four teams in the pilot project are interested/excited to continue to meet, although specific goals and timeframes for each team may differ according to individual workload's and circumstances. The importance and attention necessary to develop the relationship cannot be understated. All teams reported that it was the face-to-face meeting, at least initially, that allowed each person to get to know the other. This personal, human contact became the essential ingredient to go forward.



## **CALM PROGRAM 2011**

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