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# Manitoba Mentoring Needs Assessment

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# Acknowledgements

This report was prepared by IDT Information Development & Training Inc. (IDT Inc.) for the Manitoba Quality Network and WORKFORCE Manitoba.

The consulting team of James Conklin and Jerry Holcombe extend their thanks to the Steering Committee for their support and guidance throughout this project. We also want to thank all the participants who contributed to this project.

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# Executive Summary

During the summer and autumn of 2001, IDT Information Development & Training Inc., under a contract with Workforce Manitoba and The Manitoba Quality Network, carried out a needs assessment of mentoring in the province of Manitoba. The objective of the assessment was to identify mentoring best practices, and to compare these against current mentoring practices in Manitoba.

The study was carried out through a variety of information gathering techniques:

- A literature and Internet search
- An information gathering process involving a written survey, a focus group, one-on-one interviews, and on-site information gathering sessions with two Manitoba companies

The sessions were well-attended, and the study team was pleased with the cooperation and participation that greeted them in all information-gathering events.

After gathering information and analyzing the findings, the study team reached several conclusions (which are elaborated on later in this report):

- Mentoring plays a vital role in the development of an individual's skills, knowledge, and character.
- Mentoring is first and foremost a *relationship* (as opposed to a transaction to exchange knowledge and promote learning).
- Successful mentoring relationships depend on finding the right "match" between mentor and mentee.
- Informal mentoring tends to produce stronger relationships (and more positive outcomes) than does formal mentoring.
- Mentoring and training are distinct and different. Mentoring is a "relationship" through which learning occurs, while training is an "event" that provides a learning experience for participants.
- It is possible to develop profiles showing the characteristics of a good mentor and a good mentee (these characteristics are listed and discussed later in the report).
- Successful mentoring depends on the "chemistry" between mentor and mentee.
- Successful mentoring requires sufficient time to develop the relationship.

- Successful mentoring is more likely to occur when the mentee is consciously working toward a specific goal or future state.
- Personality conflicts are one of the main challenges to successful mentoring, and tend to be responsible for many failed relationships.

Our study revealed that certain characteristics tend to be present in successful mentoring programs, and in organizations where mentoring is inherent to the organizational culture. We provide models or frameworks that may assist organizations that wish to incorporate mentoring into their organizational and staff development strategies.

More than ever, we are persuaded that mentoring is a significant way of promoting the development of values, attitudes, knowledge, and capabilities in a workforce. We learned that the most effective mentoring is that which focuses more on the relationship and less on the development of a process and program with formal boundaries and objectives. Nevertheless, many participants told us that they believe formal mentoring is the appropriate approach for an organization to ensure that results are measurable and that broad progress (as opposed to individual success) is achieved.

We also confirmed that mentoring can be an effective strategy for increasing staff retention, for transferring knowledge, and for creating new capability.

It would seem that interest in mentoring is on the rise, and will likely continue to increase in the coming months. A conference on mentoring was held in Toronto in January 2002, with more than 300 people attending and with a slate of high-profile keynote speakers. More and more books and online resources continue to appear, and the subject is commonly raised in gatherings of trainers, HR managers, and customer service and support staff. With the growing awareness that relationships are a vital route down which knowledge and capability flow, it seems likely that organizations will continue to look for ways of increasing the quantity and quality of mentoring among their managers and staff.

# Background to the Mentoring Needs Assessment

## Objectives of the Needs Assessment

Many organizations are looking at mentoring and other "knowledge transfer" techniques as ways to retain vital organizational knowledge. In some cases, organizations have realized that with an aging workforce, significant numbers of their most knowledgeable employees will soon retire. Some of these retirees will take important knowledge with them that cannot be easily re-created. In other cases, the issue is simply one of transferring knowledge from more experienced to less experienced workers, regardless of age.

A recent study of the employment and training challenges faced by mature workers conducted by the University of Winnipeg, the Winnipeg Transition Centre and WORKFORCE Manitoba, recommends mentoring as a viable technique in addressing some of the challenges faced by mature workers.

As an informal training technique, mentoring has been around for many years. A limited amount of knowledge is available on best practices in mentoring and concrete examples of how to successfully mentor within an organization.

The objective of this needs assessment is to identify mentoring best practices in general, and to compare these against current mentoring practices in Manitoba organizations. This final report provides a framework for mentoring and makes recommendations for next steps. The project will also include the delivery of a workshop to share the findings with industry, which will include frameworks that can be used in industry to improve or develop mentoring practices.

## Approach and Methodology

The mentoring study was carried out through the following information gathering techniques:

1. A literature and Internet search to:
  - \* Identify theories and techniques regarding mentoring,

- \* Identify existing mentoring programs within organizations world-wide and determine best practices.
2. An information gathering process using four information gathering tools to inventory the current mentoring practices within Manitoba organizations. The information gathering tools included:
    - \* A survey of more than 100 Manitoba organizations
    - \* 1 focus group
    - \* Six one-on-one interviews with representatives from Manitoba companies
    - \* Half-day information gathering sessions with two Manitoba companies
  3. A gap analysis to determine the difference between the current practices and what is required to achieve the desired situation.

At the kickoff session on June 6, 2001, the project Steering Committee provided guidance on the content and audiences for the four information gathering instruments. As a result, the consulting team followed this approach.

E-mail survey of approximately 100 Manitoba organizations	<ul style="list-style-type: none"> <li>• Audience was a varied, generalist audience from business, the public sector, nonprofits, and arts organizations.</li> <li>• We attempted to get 100 responses, and we met that objective (108 were returned).</li> <li>• Respondents were identified and sorted in terms of role (HR, Operations, etc.) and sector.</li> </ul>
Focus Group	<ul style="list-style-type: none"> <li>• Audience included decision makers in operational areas (people who are responsible for the development of a group of people who report directly to them).</li> <li>• Fifteen people participated.</li> </ul>
One-on-one interviews	<ul style="list-style-type: none"> <li>• Audience will be decision makers in operational areas (same as focus group).</li> <li>• Six interviews were carried out.</li> </ul>

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Half-day sessions	<ul style="list-style-type: none"><li>• Audience will include HR managers, people involved in mentoring as mentors and proteges, and people who are in a position to judge the results provided by mentoring.</li><li>• Two half-day sessions were conducted, one with a public sector social services organization and the other with a private sector manufacturing organization.</li></ul>
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# Overview of Our Findings

The most compelling finding to emerge from our study is the simple fact that mentoring plays a vital role in the development of an individual's skills, knowledge, and character – at least as significant as the development that takes place through structured education and training.<sup>1</sup> The literature and our information-gathering among Manitobans reveal that most people who have had a significant mentor in their lives are adamant that the relationship had a profound and positive impact on their career and, more generally, on their lives.

We were also struck by the frequency (in both the literature on mentoring and in our surveys and interviews) with which people emphasize that mentoring is first and foremost a *relationship*. That is to say, mentoring should not be envisaged and studied as merely a transaction between two people to exchange knowledge and to foster new capabilities; rather, it should be thought of as a rich and dynamic relationship between two people in which a respected and experienced person has taken a keen interest in the future success of a less experienced person. This could present an interesting dilemma for organizations that intend to develop mentoring programs with highly pragmatic objectives. The inclination might be to focus stringently on the desired outcomes of the program (new competencies, reduced learning curves, improved retention rates, etc.), but this finding suggests that successful mentoring requires “room” to evolve and change in the manner of any other type of relationship.

This is related to a third major finding to emerge from both the literature and our information-gathering activities: the single most important factor in a mentoring relationship is in obtaining the right “match” between mentor and mentee. We repeatedly heard the early stages of a mentoring relationship likened to a “matchmaking” process, where the interests, personalities, learning styles, and values of the mentor and mentee must be matched and aligned for the relationship to take hold and thrive. When formal mentoring programs flounder, it is often because the matchmaking process is ineffective.

We also learned that there is a distinct difference between the results produced by formal and informal mentoring programs, and that generally speaking the

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<sup>1</sup> The definition of “mentoring” that we used in the study, and that we provided to participants in our information gathering process, was: “A formal or informal pairing of two people, one with more knowledge and experience than the other, with the purpose of having the less knowledgeable person grow and develop toward a specific objective.”

evidence suggests that informal mentoring tends to produce stronger relationships (and more positive outcomes) than does formal mentoring. We were somewhat surprised to learn that while both formal and informal mentoring can produce worthwhile “psychosocial” development, it is informal mentoring that tends to promote the strongest career development.

The literature and most of the people we interviewed were clear on the distinction between mentoring and training. Whereas mentoring is a “relationship” through which learning occurs, training is a more focused and self-contained “event” that can provide a specific learning experience for participants. Mentoring can take considerable time to develop, and the learning outcomes cannot be fully planned and controlled; training is characterized by a specific duration, and usually aims explicitly at specific learning objectives. Nevertheless, we did discover (especially during the focus group) that some people are unsure of the difference between mentoring and on-the-job training. At least one focus group participant had been inclined to believe that by pairing two people in a workplace with the view to having one person teach another about the performance of a work task, one is creating a mentoring relationship. Upon reflection and discussion, however, focus group participants concluded that this on-the-job training arrangement might culminate in the development of a mentoring relationship, but it is not in itself an example of mentoring.

Both the literature and our own information-gathering provided us with numerous suggestions on the characteristics of a good mentor. The following chart summarizes these findings.

## Characteristics of a good mentor

- **From our Survey and Conversations:**
  - A good listener
  - Empathetic
  - Encouraging
  - A teacher and communicator
  - Positive toward work and life
  - Patient
  - Genuinely interested in the mentee
  - Passionate
  - Willing to share
  - Time to share
  - Successful and respected
  - Inspirational
  - Motivating
  - Not threatened by new ideas
  - Secure and confident
  - Honest
  - Fair
  - Fun to be with
  - Caring
  - Collaborative (not competitive)
- **From the Literature:**
  - A good listener
  - Empathetic
  - Encouraging (doesn't take over)
  - A teacher (not a preacher)
  - Credible
  - Challenging (sets high expectations)
  - A developer of skills and intellect
  - A counsellor and advisor
  - A sponsor
  - A protector
  - An example
  - A validator
  - A friend
  - A source of confidential information
  - A fan

We also gathered considerable information about the characteristics of a good mentee. However, it was noticeable that the literature we consulted placed far more emphasis on the qualities of an effective mentor rather than those of a good mentee. The following chart summarizes these findings.

## Characteristics of a good mentee

- **From our survey and conversations**
  - > Open minded
  - > Eager to learn
  - > Positive
  - > Appreciative of the mentor
  - > Confident
  - > Respectful
  - > Able to apply learning to the job
  - > Able to define and pursue goals
  - > Driven to succeed
  - > Somewhat independent
  - > Patient
  - > Willing to work with people and teams
  - > Willing to try things and change
  - > Proactive
  - > Flexible
  - > Able to see that relationships can be more important than concrete results
  - > A volunteer
  - > Good listener
- **From the literature:**
  - > Confident and high self-esteem
  - > Clear vision of the future state
  - > Time to learn and change
  - > Ability to cope with stress
  - > Independent

Much of the social science literature on mentoring consists of research that tries to uncover the difference between successful and unsuccessful mentoring relationships. From the literature and our interviews we learned that there is considerable interest in determining whether formal or informal mentoring arrangements are more successful, and what aspects of the mentoring cycle and relationship are critical to the success of the relationship. Though it is our view that this research has not yet produced definitive results, it does seem clear that the following three factors deserve close attention by anybody who is establishing a mentoring program or culture within an organization:

- The “chemistry” between mentor and mentee – as is the case with any relationship, the chemistry between the two individuals must foster a desire to extend and maintain the mentoring relationship over time. There must be a willingness to extend trust, to invest time, and to extend respect.
- The time available to develop the relationship – mentoring takes time. Both the mentor and mentee must be willing to invest the needed time in the relationship, and their respective work situations must allow for the time needed for knowledge transfer and learning to occur.
- The goal of vision of the mentee – interestingly, the research suggests that the mentee should be consciously working toward a specific goal or future state. This vision seems to be the catalyst for the relationship (from the mentee’s perspective), and generates the needed commitment to sustain the relationship.

Our research also indicates that specific barriers tend to arise in mentoring relationships:

- Poor “matchmaking” – in formal mentoring programs, the matchmaking process is crucial to the success of the relationship. Success is more likely when time is taken to ensure that the chemistry is right between the mentor and mentee, and that the two are compatible in terms of personality, learning style, interests, and passions.
- Personality conflicts – not surprisingly, the literature indicates that when the matchmaking process is problematic, personality conflicts often arise, and this factor is often cited as the major reason for the failure of mentoring relationships and mentoring programs. Whereas trainees and trainers are relatively immune to the personality differences and disconnects that might separate them, the mentoring relationship is so close and long-lasting that it can easily fall victim to personality conflicts.
- Inadequate time – we learned from the literature and our interviews that when people are unable to find the time needed to develop a mentoring relationship, the relationship will languish and results will be poor.

# Frameworks for Mentoring

One element of our mandate for the conduct of the study was to develop a mentoring framework. By “framework,” we mean a set of high-level guidelines for the development of a mentoring program.

We encountered few existing frameworks in the mentoring literature, and therefore we have based the two frameworks in this section on a synthesis of the pertinent elements from our findings. We created two frameworks because it is evident that formal and informal mentoring approaches are quite different, and require different steps to implement.

Nevertheless, for both formal and informal mentoring it is clearly vital that the match between mentor and mentee be effective. Formal mentoring programs attempt to create good relationships through a formal matchmaking process. Informal mentoring takes the opposite approach, and allows relationships to form in a natural, unmediated way.

The following two subsections present our suggested frameworks for formal and informal mentoring.

## Framework for a Formal Mentoring Program

Although our research did not uncover a structured mentoring program that was demonstrably superior to all others and that consistently produced meaningful results that could be substantiated by data, we did find that both researchers and Manitobans who participated in the information-gathering tended to identify common elements that ought to be included in a formal, structured mentoring program. We have synthesized these elements in this subsection, and include a process flow diagram to give readers a sense of the sequence of steps that could occur between intake and completion.

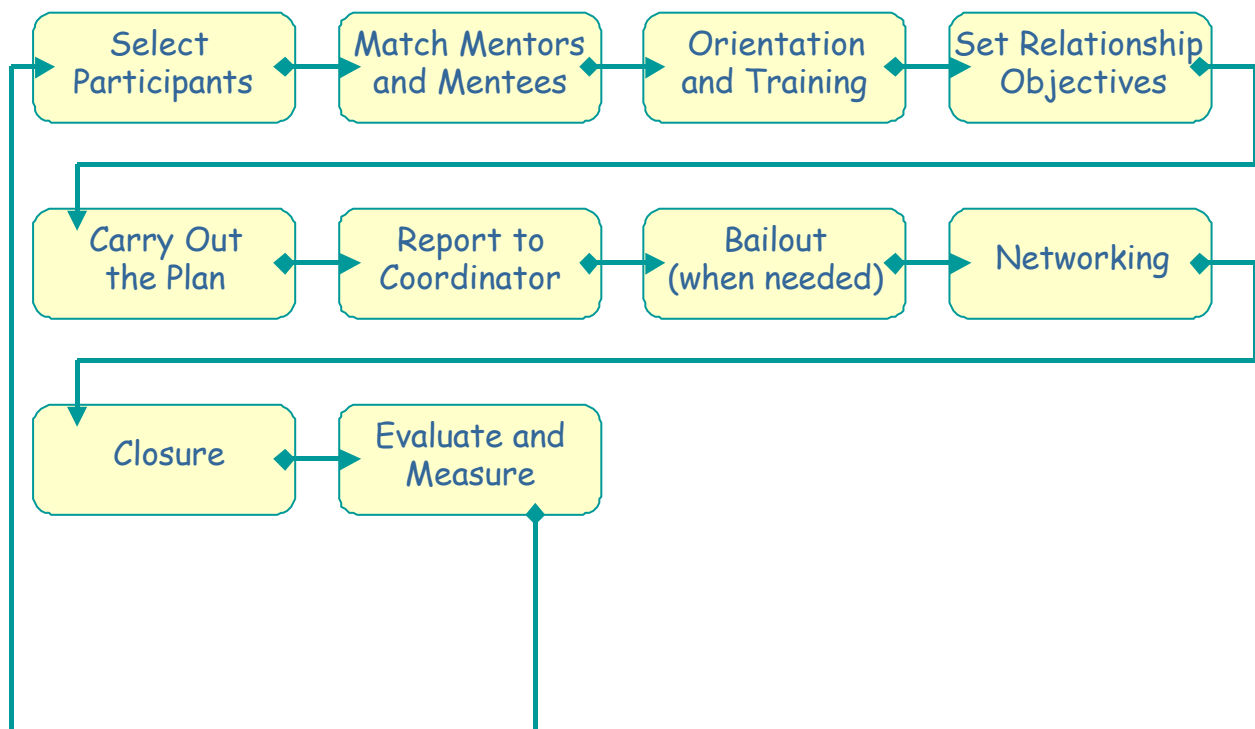
Our research findings suggest that the presence of the following elements help to ensure the success of a formal mentoring program:

- A Mentoring Program Coordinator who provides direction and coordination for the program
- Fair and inclusive program guidelines, including the following
  - \* Defined roles of mentor and mentee

- \* Purpose: Clearly defined outcomes and objectives
- \* Objectives
- \* Goals and tracking
- \* A bailout procedure (whereby the mentor or mentee can end the relationship)
- \* Measures to ensure that the program is open and inclusive, and allows everybody an opportunity to participate
- Sufficient time for both mentors and mentees to devote to the relationship
- Opportunities for networking during the course of the relationship (that is, networking involving all program participants)
- An event at the end of the program period to provide closure for participants
- A method for measuring and reporting results
- Strong management support

The following illustration summarizes a possible process flow for a formal mentoring program derived from our research findings. The illustration is followed by an explanation of the steps in the process.

## Framework for a formal mentoring program



The activities within these steps could include the following:

- **Select Participants.** The Program Coordinator should oversee a process to identify, quality and select mentors and mentees. Ideally, this should begin with the selection of mentees, and the identification of their needs and personalities. After finalizing the list of mentee candidates, the Program Coordinator would seek to identify suitable mentors.
- **Match Mentors and Mentees.** The Program Coordinator would oversee a process for assuring strong compatibility between mentor and mentee. This process could involve a personality assessment (such as the Myers Briggs assessment, or a Kolbe assessment), as well as a preliminary meeting and discussion between potential mentor-mentee matches. Mentees must be given an opportunity to participate in this process.
- **Orientation and Training.** The Program Coordinator should schedule and hold joint or individual orientation and training sessions for mentors and mentees.
- **Set Relationship Objectives.** After the pairs have been established, the mentor and mentee should agree on a clear purpose for the relationship, and specific objectives for the relationship. The mentor and mentee should also agree on a schedule for meetings and discussions.
- **Carry out the Plan.** The mentor and mentee should meet periodically, and should carry out the agreed-to plan.
- **Report to the Program Coordinator.** The mentor and mentee should periodically report to the Program Coordinator on their progress in carrying out the plan.
- **Bailout Procedure** (when needed). When needed, the mentor or mentee must be permitted to end the relationship.
- **Networking.** The Program Coordinator should provide for occasional networking opportunities that allow mentees to meet as a group, mentors to meet as a group, and mentors and mentees to meet in a plenary session.
- **Closure.** At the conclusion of the program, a wrap-up session should be held with all mentors and mentees to thank them for their participation and to celebrate success and look forward to the next intake.
- **Measurement.** The Program Coordinator should track progress during the relationship, and should measure the results at the conclusion of the relationship.

## Framework for Informal Mentoring within Organizations

By its nature, informal mentoring often tends to lack structure, and to take the form primarily of a close and natural relationship between two people. However, given the significant benefits that are to be derived from informal mentoring, some organizations attempt to create an atmosphere in which informal mentoring becomes a commonplace feature of the environment. Although our research did

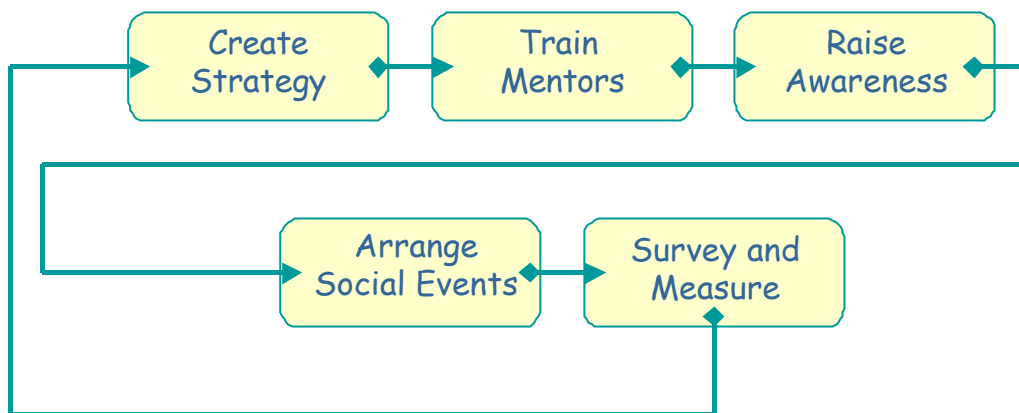
not uncover a perfect consensus on what factors would promote the development of a mentoring culture in an organization, the literature and study participants did suggest a variety of ways in which informal mentoring could be encouraged. This subsection synthesizes these ideas, and also presents a process flow that shows how informal mentoring could be incorporated into an annual cycle of activities.

Our research findings suggest that the presence of the following elements could help to encourage the development of a mentoring culture:

- Take ownership of promoting informal mentoring. Somebody within the organization must act as champion of informal mentoring, to ensure that the steps and measures summarized here are put in place and acted upon. People whose responsibility includes organizational change, organizational capability, strategic planning, human resources, or training and development are among the possible candidates.
- Senior Managers and respected senior employees model the desired behaviour. Mentoring is seen as an expected part of a leader's role.
- Provide mentoring skills training. Provide annual workshops in mentoring skills (such as listening, coaching, motivating, focusing, etc.), so experienced employees have the opportunity to learn the "do's and don't's" of effective mentoring. The workshop could include encouragement to form relationships that allow participants to practice the skills they have learned.
- Publicize successful mentoring relationships. Use existing communication vehicles to promote mentoring by applauding the contributions made by effective mentors. Tell success stories from the viewpoint of the mentor, the mentee, and the organization's leaders.
- Measure and promote through employee surveys. Include questions on mentoring in annual employee surveys, so you have an indication of how widespread and effective informal mentoring is becoming in the organization, and also are demonstrating to managers and staff that mentoring is an important element of life in the organization.

The following illustration summarizes a possible process flow for promoting the growth of informal mentoring derived from our research findings. The illustration is followed by an explanation of the steps in the process.

## Framework for encouraging informal mentoring



The activities within these steps could include the following:

- **Create mentoring strategy.** This could be accomplished by including specific mention of mentoring in the organization's overall strategy.
- **Train prospective mentors.** This could take the form of an annual workshop that provides an overview of the tips and techniques that underlie effective mentoring, along with information on the benefits of acting as a mentor and advice on how to handle specific situations. The workshop could also act as a way of motivating experienced professionals to consciously seek out promising new people to mentor for the coming year.
- **Raise awareness of mentoring and its benefits.** Encourage senior management to model mentoring behaviours, and to recognize exemplary mentors and mentees.
- **Arrange social events.** Get potential mentors and mentees together informally (around food and social activities), so that people will get to know each other and relationships have a chance of taking shape
- **Survey employees about mentoring.** Include questions about mentoring on regular employee surveys.

# Detailed Findings

In this section, we present a more detailed version of our findings. We have segmented this presentation as follows:

- Findings from the review of the existing research and business literature on mentoring
- Findings from the survey on mentoring that we distributed via our Steering Committee
- Findings from the site visits and interviews that we carried out in Manitoba, and from the focus group that we held in Winnipeg

## Findings from the Literature Review

Our review of the extensive literature on mentoring indicated that this subject has been the subject of intense study by social scientists and management theorists and practitioners for the past twenty-five years. Much of this interest stems from a book published in the 1970s that indicates that mentoring during young adulthood is a significant factor in determining whether an individual will lead a successful life.<sup>2</sup>

This book presents the results of a study based on interviews with forty men, and concludes that a mentor acts as a teacher, sponsor, counselor, developer of skills and intellect, host, guide, and exemplar, and as a person who helps the young person to realize a dream or vision of a future life. This last point is, according to the study, the most important: successful mentoring focuses on a broad vision of success rather than on specific learning objectives. The study found that mentoring involves elements of a parent-child relationship and peer support, and is akin to intense “love” that lasts from two to ten years.

This study (which is usually referred to in the literature as “the Levinson study,” after the man who developed and championed the research) tended to set the standard for much subsequent research into mentoring. Some later studies

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<sup>2</sup> Levinson, D. J., Darrow, C. M., Klein, E. G., Levinson, M. H., & McKee, B. (1978). *The Seasons of a Man's Life*. New York: Knopf.

attempted to narrow the definition of mentoring, or to suggest that mentoring does not always need to involve the strong emotional bonding suggested by Levinson.<sup>3</sup>

The literature from the past few decades indicates that there are several specific reasons underlying the growing interest in mentoring. For example, we encountered the summary of a recent survey linking mentoring to improved rates of employee retention: “Data from the 1999 Emerging Workforce Study show that 35% of employees who don’t receive regular mentoring plan to look for another job within 12 months. But just 16% of those with good mentors expect to jump ship.”<sup>4</sup> The survey also estimates the “...cost of losing a typical worker at \$50,000,” which helps to quantify the cost of neglecting to add mentoring to an organization’s developmental repertoire.

We also learned that in today’s competitive and changing job market, more young people are aware of the benefits that they can gain from workplace mentoring. For example, in a survey of 300 students attending the 25<sup>th</sup> Association for Computing Machinery International Collegiate Programming contest in February 2001, almost 40% said that mentoring was an important factor in their decision of which company they would work for, and another 30% said it was of moderate importance.<sup>5</sup>

The growing emphasis on leadership may also help to explain the growing interest in mentoring. One researcher writes, “Leadership and mentorship appear to be closely aligned, as relationships, rather than structures, become more valued within work settings.”<sup>6</sup> In other words, the collegial and participative work environment of the early 21<sup>st</sup> century, where the “command-and-control” approach to management is being supplanted by a less coercive, more motivational approach, may be helping to foster the recognition that mentoring is a powerful tool for creating the relationships and results that organizations are seeking.

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<sup>3</sup> See, for example, Sharan Merriam, “Mentors and Protégés: A Critical Review of the Literature,” *Adult Education Quarterly* (Vol. 33 No. 3) Spring, 1983, 161-173.

<sup>4</sup> Jennifer Reingold and Robert McNatt, “Why Your Workers Might Jump Ship,” *Business Week* (March 1 1999) Issue 3618.

<sup>5</sup> Andy Holloway, “It’s Who You Know,” *Canadian Business* 04/30/2001, Vol. 74 Issue 8, p. 81.

<sup>6</sup> Ann Darwin, “Critical Reflections on Mentoring in Work Settings,” *Adult Education Quarterly* (May 2000) Vol. 50 Issue 3, p. 197.

Aside from providing us with insights into the reasons that mentoring is now on the management agenda, we learned that the literature on the subject tends to recognize that mentoring can serve two purposes<sup>7</sup>:

- Fostering career development
- Fostering psychosocial development

Investigators who have delved into the types of benefits and results that mentees and managers tend to ascribe to mentoring usually mention one or both of these purposes. Some mentoring relationships are seen to produce results specifically related to a the mentee's career within an organization; others are seen to contribute more broadly to the development of an individual's psychological and social maturity and ability.

Another area of consensus in the literature is that mentoring is quite distinct from teaching. As one popular text on the subject states, "Mentoring involves going above and beyond. It is a relationship in which a person with greater experience, expertise, and wisdom counsels, teaches, guides, and helps another person to develop both personally and professionally."<sup>8</sup> We often encountered statements that placed significant emphasis on mentoring as a type of close relationship between two people that produces learning and development as one of its outcomes.

The literature also suggests that mentor-mentee relationships can be extremely close – much closer than most supervisor-subordinate or peer relationships in the workplace. One way to understand this unique feature of mentoring is to remember that mentoring often occurs in the context of change. The mentee is changing – growing, learning, adapting – and the mentor is facilitating the change. Change often involves anxiety and worry, and the mentor provides reassurance, comfort, and friendship. When mentoring occurs within the context of organizational change, a close and trusting relationship is by no means uncommon.

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<sup>7</sup> See, for example, Henry Thibodeaux, Rosemary Lowe, "Convergence of Leader-Member Exchange and Mentoring: An Investigation of Social Influence Patterns," *Journal of Social Behaviour and Personality* (March 1996) Vol. 11 Issue 1, p. 97. Also see Kram, K.E. (1985). *Mentoring at work: Developmental relationships in organizational life*. Glenview, IL: Scott, Foresman.

<sup>8</sup> Gordon Shea, *Mentoring: How To Develop Successful Mentor Behaviors* (Menlo Park: Crisp Publications, 1997), p. 15.

Although mentoring is widely regarded as a powerful tool for promoting the development of new attitudes and abilities, the literature shows that success in mentoring programs tends to vary. As one writer notes, “Assigned mentors are like arranged marriages; some take, some don’t. It all depends on commitment and chemistry.”<sup>9</sup> Peddy’s emphasis here is on the word “assigned” – she is one of the commentators who is skeptical of the usefulness and effectiveness of formal mentoring programs.

Indeed, the literature also shows that formal mentoring programs meet with both success and failure. One academic who has completed a review of the mentoring literature and has developed and managed a mentoring program for women in business has attempted to identify the factors that contribute to the success and failure of formal mentoring.<sup>10</sup> She found that formal mentoring succeeds when:

- There is strong compatibility between mentor and mentee
- The mentor has the ability and resources to help in practical ways
- The relationship takes on elements of friendship and fun
- The relationship provides inspiration and motivation for the mentee

She also found that formal mentoring fails when:

- Contacts are infrequent
- There is insufficient time to devote to the relationship
- The purpose of the relationship lacks focus
- The roles of mentor and mentee are largely undefined
- The program lacks guidelines
- The mentor and mentee are incompatible

This researcher also suggests that an effective formal mentoring program should include:

- Objectives
- A selection process that mentees participate in
- Orientation for mentors and mentees
- Goals and tracking

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<sup>9</sup> Shirley Peddy, *The Art of Mentoring* (Houston: Bullion Books, 1998).

<sup>10</sup> Atlanta Sloane-Seale, “Mentoring: A Strategy for Improving Adult Learning and Development,” *CJSAE*, 11,2 (November 1997) 47-62.

- A bailout procedure (whereby the mentor or mentee can end the relationship)
- Networking and closure

Interestingly, we found that some of the research suggests that organizations can benefit more from informal than formal mentoring. The one comprehensive study on informal and formal mentoring concludes that informal mentoring provides broader and more consistent career benefits than either formal mentoring or no mentoring. However, informal and formal mentoring tend to provide the same levels of psychosocial benefits.<sup>11</sup> This finding may strike some as counter-intuitive, in that it may seem more likely that formal mentoring would tend to produce somewhat narrow career-related benefits while informal mentoring would produce broader psychosocial benefits. Instead, the study suggests that informal mentoring is better than formal mentoring at producing career benefits, and is the equal of formal mentoring at producing psychosocial benefits.

A later study may help to explain this apparent anomaly:

“...[an] investigation of assigned mentorship indicated that formal mentoring relationships provided psychosocial support but limited career or vocational benefits and, thus, concluded that formal mentoring programs may have limited effectiveness. This conclusion should be reconsidered in light of the present findings. As illustrated here, in some situations, individuals may benefit most by activities characterized as psychosocial. The effectiveness of peer mentoring programs may be better evaluated by assessing how well the program meets the needs of individual participants (e.g., satisfaction with the experience) rather than by solely examining the extent to which different functions are served.”<sup>12</sup>

In other words, although formal mentoring tends to produce psychosocial (rather than career) benefits, it is precisely these psychosocial benefits that are often most significant to the people who participate in mentoring. Informal mentoring tends to provide the best payoff in terms of developing specific career skills in employees, and hence it may be worthwhile for organizations to encourage the

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<sup>11</sup> Georgia Chao and Pat Walz, “Formal and Informal Mentorships: A Comparison on Mentoring Functions and Contrast with Nonmentored Counterparts,” *Personnel Psychology* (Autumn 1992) Vol 45 Issue 3, page 619.

<sup>12</sup> Tammy Allen and Joyce Russell, “Formal Peer Mentoring: Factors Related to Proteges’ Satisfaction and Willingness to Mentor Others,” *Group & Organizational Management* (December 1997) Vol. 22 Issue 4, p. 488.

development of a culture that fosters the formation of informal mentoring relationships. Moreover, both formal and informal mentoring produce the psychosocial benefits that allow employees to create successful lives (which would include ways of integrating work into one's broader life, and of coping with change and stress), and hence many organizations who are concerned with issues such as employee turnover may find it useful to consider forming a formal mentoring program as one way of addressing the issue.

## Findings from the Survey

The survey was distributed via the project steering committee to an unknown number of people. We received 110 completed surveys, with more than half being submitted by people in the private sector, 20% from the public sector, and 15% from the nonprofit sector. Respondents came from a wide variety of business disciplines, with administration, production, human resources, training, and operations representing the largest individual groupings. The survey questions were organized into general information, a second section that asked questions about the respondent's experience with formal or informal mentoring in the workplace, and a third section that asked questions about the respondents personal experiences as either a mentor or mentee.

Respondents indicated that mentoring plays a significant and positive role in retaining and transferring organizational knowledge and in creating organizational capability. More than 95% of respondents agreed that mentoring is an effective way of transferring knowledge, and 89% agreed that mentoring is an effective way to retain knowledge within an organization. When shown the statement, "Formal workplace mentoring could be an extremely effective way of helping employees to learn and adapt," 87% of respondents agreed. When shown the statement, "Informal mentoring could be an extremely effective way of helping employees to learn and adapt," 79% of respondents agreed.

We also found that there is a reasonably high level of awareness of mentoring arrangements in Manitoba. Approximately 60% of respondents stated that they are aware of informal mentoring arrangements within Manitoba, and 26% stated that they are aware of formal mentoring programs in Manitoba. While 69% of participants said that they have participated in an informal mentoring relationship (as either mentor or mentee), only 18% have participated in a formal mentoring program.

Respondents were less clear when considering questions about the effectiveness of formal and informal mentoring. When asked if formal mentoring is more effective than informal mentoring, 23% agreed, 37% did not know, and 24% thought that effectiveness would be approximately the same for formal and informal mentoring. Though we did not ask a specific question to confirm this, it is possible that respondents were suggesting that formal and informal mentoring

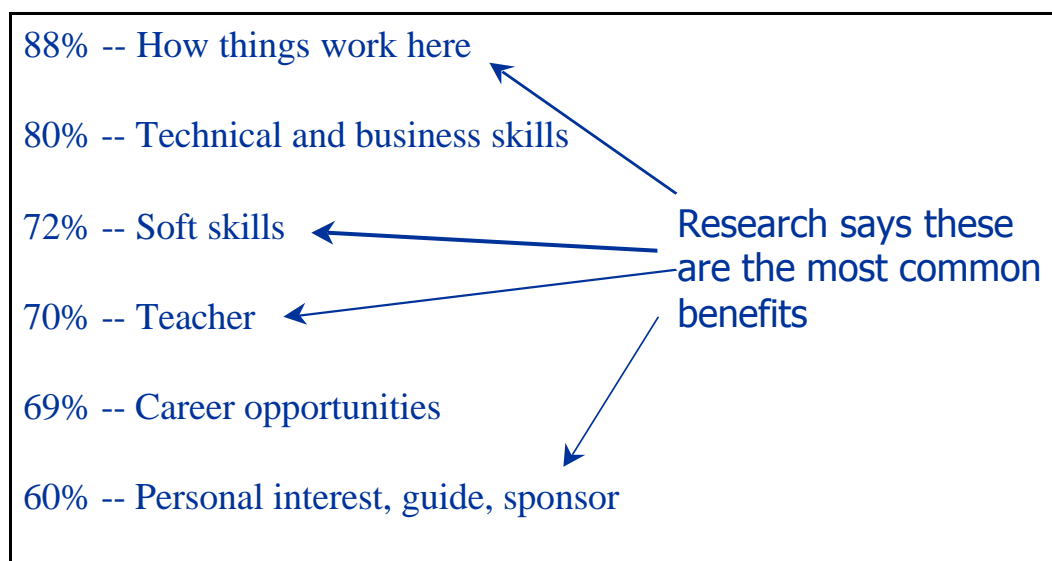
tend to be equally effective. In any event, 88% of respondents said that both mentors and mentees receive benefits from the mentoring relationship.

In terms of their personal experience with mentoring, 69% of respondents said that they had a mentor when they were young adults. When asked about the role played by their mentor, 70% of respondents said that their mentor(s) acted as a teacher, and 61% said that their mentor took a personal interest in their career and guided or sponsored them.

We also asked a series of questions that delved into the benefits that mentees derived from the relationship, which resulted in the following range of responses:

- 80% said that mentees learn new business or technical skills from mentors.
- 73% said that mentees learn new soft skills from mentors.
- 88% agreed with the statement that “A mentor helps you gain knowledge about how things work, and how things get done.”
- 69% agreed with the statement that “You experienced improved career opportunities and advancement because of your mentors.”

As shown in the following exhibit, these responses are not entirely consistent with the opinions expressed in the research literature that we consulted.



In other words, our survey respondents placed a greater emphasis on the proposition that mentoring can help mentees develop specific technical and business skills, and encounter new career opportunities, than is suggested by the literature. The survey results do not allow us to account for this discrepancy. It is conceivable that respondents were applying a broader definition of “mentoring” than was intended. In any event, in the more discursive qualitative information gathering that we performed (see the next section of this report), we found a much

greater degree of consistency between the opinions of Manitobans and those expressed in the literature. Equally significant is the fact that the survey does provide reasonable confirmation for four other common mentoring benefits that are reported in the literature, as shown on the exhibit above.

We also asked several questions about the characteristics of good mentoring, which elicited the following response:

- 48% said that mentors spend more time listening than speaking
- 81% said that effective mentoring requires regular contact between the mentor and mentee
- 57% said that effective mentoring relationships require elements of friendship and fun
- 88% said that “An effective mentoring relationship includes inspiration and motivation”

These findings are reasonably consistent with the literature. Certainly the literature suggests that time and regular contact is a significant factor in mentoring success, and that a good mentor will often motivate and even inspire the mentee. However, the literature also suggests that listening is a critical mentoring skill, and once again it is possible that Manitoba respondents were including traditional “teaching” or “training” in their definition of mentoring.

The survey also included some lines on which respondents were encouraged to add additional open-ended comments, and Appendix A reproduces the more than seven pages of brief comments and observations. Several themes become apparent from a reading of these comments, perhaps the most striking of which is well-expressed in the following statement: “My mentor believed in my potential, and as a result encouraged and helped me to develop as a person, not just as an employee.” Other themes include:

- Both formal and informal mentoring can be valuable developmental experiences. Numerous comments supported the usefulness of mentoring; a few pointed out that mentoring relationships do not always succeed, and mentoring is not in itself solve all of an organization’s training and development challenges.
- If you opt for a formal mentoring program, the structure must be carefully designed and implemented (including such elements as formal objectives and selection processes).
- Mentoring should be developed in conjunction with other developmental tools (such as traditional training).
- Mentoring can be rendered problematic through certain recurring barriers, which can include:
  - \* Lack of time to devote to the relationship
  - \* Lack of focus, definition, and structure

- \* Insufficient awareness of the benefits to be derived from mentoring
  - \* Poor selection and “matching” process, and the resulting personality conflicts between mentor and mentee
  - \* Ineffective communication and growing misunderstandings between mentor and mentee
  - \* An organizational culture that does not support or value mentoring
  - \* Mentors who do not have adequate mentoring skills
  - \* Insufficient trust between the mentor and mentee
- Being a mentor is a rewarding experience.

## Findings from the Site Visits, Interviews, and Focus Group

Over the course of the study, we carried out a lengthy focus group with fifteen participants. We also conducted six detailed interviews with representatives from organizations that either are currently using mentoring as a development tool, or are in the process of designing and implementing a mentoring program. Finally, we carried out two on-site visits that included interviews with both mentors and mentees to investigate the workings and success of existing mentoring arrangements.

During these qualitative information-gathering exercises, we asked the same questions whenever possible to ensure that we would be gathering comparable answers with which to populate our analytical framework. The findings show a significant degree of consensus among Manitobans who currently participate (or who have participated) in mentoring arrangements.

When we invited participants to recall their most significant mentors and asked them to consider what the relationships added to their lives, we were presented with both psychosocial and career benefits. Many participants emphasized that mentoring allowed them to experience significant and worthwhile personal growth that went beyond job-related development. Some commented that their mentors helped them to attain more focus in their careers and lives, in part by acting as a “sounding board” and confidante. We also heard several times that mentors helped their mentees to identify their strengths, and to focus their development on the nurturing and growth of those strengths, and that mentors helped their mentees to develop a deeper interest – and sometimes even a passion – for their work. Participants often commented that their mentors helped them to adjust to a complex work environment, and to understand the culture and history of an organization and the principles by which the workplace operates. We also learned that many mentors helped their mentees to find a comfortable and suitable role within an organization, and to establish a “tone” for a longer career.

We also asked participants to reflect on the factors that made these mentoring relationships so memorable and successful. The responses indicated that great mentors are both respected by others throughout their organizations, and demonstrate respect and affection for the people they interact with. A great mentor tends to be genuinely interested in the mentee's future, and almost needs to act as a mentor (in other words, mentoring is simply a natural part of what a great mentor does). A great mentor is generous, patient, and often passionate about work and life. Almost all participants told us that their mentors became close friends, and most indicated that the friendship continued for many years.

At the same time, however, several participants were anxious to make it clear that not everyone can be a great mentor. A mentor must have a certain attitude to life, as well as certain interpersonal skills.

We asked participants to help us understand the extent to which mentoring is an established developmental approach in Manitoba organizations. We learned that participants are aware of several Manitoba organizations that are currently either administering a formal mentoring program today, or are in the process of setting one up. At the focus group, 40% of participants were aware of a formal workplace mentoring program in Manitoba. Participants in the qualitative information gathering process were able identify mentoring programs in manufacturing, arts, and public sector organizations in Manitoba.

We invited participants to consider the most common barriers to effective mentoring, and were advised that the two most significant barriers are insufficient time to devote to the relationship, and difficulties in successfully matching mentors and mentees. These two barriers are entirely consistent with our findings from the survey, and from the literature review. Participants also identified a variety of other barriers:

- Insufficient management support
- Difficulties in assessing and selecting mentors and mentees
- Difficulties in monitoring and measuring the success of mentoring programs
- Insufficient numbers of qualified mentors
- Difficulty in determining the degree of formality that a mentoring program requires
- Geography – mentors and mentees working in different locations, and hence having trouble arranging times and locations for meetings
- Organizational culture that is not conducive to a successful mentoring program
- Finding a process for selecting mentees that is fair and does not give rise to allegations of favouritism

- Finding ways to make use of mentoring in an environment where job promotion is based on open competitions among existing employees (in other words, in this type of environment a mentoring program might be seen as a way of circumventing the normal open and fair job competition process)

One of the more intriguing results that emerged from the open-ended information gathering came when we asked participants to consider the major benefits that can be gained from mentoring relationships. We asked them to consider these benefits from the perspective of an organization, rather than from the perspective of an individual mentee or mentor. Participants mentioned several organizational benefits (the italicized points were the benefits that were most often mentioned by participants):

- Increased loyalty and *retention* of employees who receive mentoring
- *Faster development of new leaders*
- Faster orientation and enculturation
- Knowledge transfer from experienced staff to new staff
- Strengthened relationships and culture
- Succession planning
- New employees learn to handle sensitive issues and problems
- “Preventive maintenance” – reducing dismissal situations before they arise
- Higher overall capability of the workforce
- Faster time-to-productivity for new hires

We also learned that Manitoba participants in the study have clear opinions about the key elements of formal mentoring programs, and that these opinions are very similar to the views expressed in the mentoring literature. Participants indicated that the following elements should be present in a formal mentoring program:

- **Coordinator:** A neutral third-party should coordinate the program and keep it on track.
- **Matchmaking:** The coordinator should facilitate the matches and ensure that the match “takes.”
- **Purpose:** The program should have clearly defined outcomes and objectives, as should each mentoring relationship.
- **Measurement:** The coordinator should devise and implement a method for measuring results.
- **Fairness:** Mentoring programs must be seen as fair (for example, everybody should have an equal opportunity to participate).
- **Training:** Both mentors and mentees should be provided with orientation and training to help them get the most out of the relationship.
- **Support:** Management must visibly support the mentoring program.

Participants were also invited to consider informal mentoring in Manitoba, and advised us that informal mentoring is widespread. In fact, we learned that in a few organizations informal mentoring is integral to the culture and is widely practiced. We were also advised, however, that informal mentoring cannot be considered a replacement for training (a finding that echoes some of the open-ended comments that were written on the returned surveys).

We invited participants to consider whether informal mentoring is simply a phenomena that happens, and that cannot be influenced or fostered within an organization, and we discovered that on the contrary most participants felt strongly that informal mentoring can be expanded and improved. Participants suggested several specific ways in which informal mentoring can be expanded:

- Raise awareness of mentoring and its benefits
- Provide training for mentors
- Encourage senior management to model mentoring behaviours, and to recognize exemplary mentors and mentees
- Specifically mention mentoring in the corporate strategy
- Seek to improve mentoring behaviours by planning it as a culture-change program
- Include questions about mentoring on regular employee surveys
- Get potential mentors and mentees together informally (around food and social activities), so that people will get to know each other and relationships have a chance of taking shape

We also asked participants to consider the respective benefits of formal and informal mentoring, and found that most people were inclined to see formal mentoring as more beneficial for organizations, and informal mentoring as more beneficial for individuals. As the representatives from one organization told us, even if formal mentoring does not produce results that are as dramatic as informal mentoring, nevertheless the organization has a greater chance of directing and measuring the results of a formal program. Modest accomplishments that affect numerous people and that are effectively targetted on organizational priorities may be more significant than dramatic accomplishments that affect only a few people and that are targetted on individual interests and priorities. Overall, participants identified the following benefits of formal / informal mentoring:

- Formal mentoring
  - \* Is better for the organization as a whole
  - \* Is more inclusive and widespread
  - \* Could be more equal in treatment
  - \* Is easier to measure
  - \* Is known and visible through a formal mentoring contract
- Informal mentoring

- \* Is better for the individuals
- \* Is more flexible
- \* Has a longer duration of interaction