



# THE MENTORSHIP MODEL FOR WOMEN IN STEM



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# INTRODUCTION

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## STATUS OF WOMEN IN STEM

It is clear that more women than ever before are pursuing education in the fields of Science, Technology, Engineering and Mathematics (STEM). In turn, we are seeing more women who are employed within STEM industries or applying their STEM knowledge at their workplace.

However, studies show that women in STEM are still not advancing at the same rate as their male counterparts. There is also evidence that women are exiting the STEM industry in higher volumes than men, typically after five-seven years in the industry.

This represents a great pool of unfulfilled and lost potential that could greatly benefit the economy and contribute to the success of individual enterprises. Corporations are losing their investment in candidates who leave prematurely.

Mentorship is often cited as a successful means of engaging, motivating and developing employees, and aligning their progression with the objectives of their employer. Organizations typically benefit from a more satisfied workforce, increased productivity and streamlined knowledge transfer, while mentees gain valuable counsel and insight to help them achieve their personal career objectives.

## MENTORSHIP MADE SIMPLE

The YES mentorship model including '*ADVANCE: The Mentorship Tool for Women in STEM*' will help STEM organizations access the benefits of mentorship and is designed for straightforward implementation, little administrative cost and low maintenance.

This pilot model has been created to specifically address the needs of small to medium sized enterprises. Our model aims to help SMEs, typically with over 50 employees, retain and develop the talent of their female staff who hold degrees or work in STEM. Ideally, these women should have at least 5 years' experience working in the STEM industry and have a goal for career advancement.

Sponsored by the executive team and with the support of managers and supervisors, this mentorship model can thrive and the organization and its employees can reap the rewards.

## WHY CHOOSE THE YES MENTORSHIP MODEL?

The YES Mentorship Model will help selected women in your company access mentors either internally or from approved external organizations. YES will act as an external partner to support implementation of the initiative.

Senior management can target women with advancement potential to take part in the initiative and strategically develop talent in alignment with organizational goals.

The tool will help track the progression of participants in a quantifiable manner. Mentees will map out objectives early in the process and track progress made in meeting these goals. Reporting is completed at assessment periods every six months.

The model will help women advance in their careers, contribute towards a more level corporate playing field, and encourage women's participation at all levels of responsibility within the company.

# GETTING STARTED

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## WHAT IS MENTORING?

Mentoring is a relationship where an experienced person (a mentor) shares his/her knowledge, expertise and experience with a less experienced person (a mentee) who is willing to learn and benefit from this exchange. Mentoring focuses on the mentee as a learner, who is working toward achieving specific goals as part of the mentoring process.

<p><b><i>Mentoring is:</i></b></p> <ul style="list-style-type: none"><li>• Voluntary</li><li>• Trust-based</li><li>• Focused on defining and achieving the mentee’s professional goals</li><li>• Mentee-driven and mentor-supported</li><li>• Productive and beneficial for both mentors and mentees</li><li>• An on-going active collaborative relationship</li></ul>	<p><b><i>Mentoring is not:</i></b></p> <ul style="list-style-type: none"><li>• An obligation</li><li>• A relation of power</li><li>• A one-way relationship</li><li>• A private course or coaching session</li><li>• A personal counseling or therapy session</li><li>• A rigid process with strict instructions</li></ul>
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## PRINCIPLES OF MENTORING

Below are six basic principles of mentoring. There is a higher chance of building a successful relationship when mentees, mentors and the organization understand and embrace these principles:

<p><b>Mentoring relationships are based on trust</b> Trust is one of the most important elements of a mentoring relationship. If trust cannot be established between a mentee and a mentor, or if this trust is broken, the relationship will be unable to succeed.</p> <p><b>A mentor is a role model</b> Mentees learn by asking questions, listening and observing their mentors. Mentors lead by example based on experience, and should always reinforce positive and professional behaviors in their mentees.</p> <p><b>Mentoring is given freely and is freely received</b> Mentors are not paid. They volunteer their time and receive intangible benefits from the relationship, such as the satisfaction of sharing their knowledge and seeing another individual succeed.</p> <p><b>Mentoring is a collaborative partnership: treat each other with respect</b> Like all other relationships, mentoring partners treat each other as they would like to be treated themselves. This includes respecting meeting dates and times and making an effort to return phone calls and/or e-mails in a timely fashion. It also requires a collaborative approach to setting goals and evaluating results.</p> <p><b>Successful mentoring relationships focus on the mentee as the learner</b> Mentors advise and guide the mentee, but they do not do the mentee’s work for them. A mentor teaches how to build skills and develop behaviors that will allow a mentee to make sound business and professional decisions on their own. Mentees should be open to the constructive criticism a mentor may offer.</p> <p><b>Mentoring is rewarding, satisfying and enjoyable for mentors and mentees</b> A successful mentoring relationship should give both mentors and mentees a sense of accomplishment and fulfillment.</p>
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## ANNOUNCING THE PROGRAM

The way the mentorship model is communicated internally will impact its implementation, effectiveness and sustainability. Some considerations to take into account when spreading the word about the initiative:

**SENIOR EXECUTIVES:** Senior management need to be seen as the driving force or ‘sponsors’ behind the initiative. Senior executives will need to champion the model and ideally take part as mentors themselves. This will ensure the model has the attention and legitimacy required to succeed. The major communication regarding the program needs to come from the top and the messaging needs to be emphasise the value of the initiative to all staff.

**HR:** the involvement of the Human Resources staff will be in a supportive, administrative and organizational capacity. HR will assist with communications throughout the program, but the voice will be that of senior management.

**MID-LEVEL MANAGEMENT:** The positive effects mentorship has on productivity, engagement and skill development needs to be communicated to mid-level management and team leaders from the beginning to solicit their full support. This support is seen as extremely important to the success of the model as mid-level management influence the schedule and priorities of potential mentees.

**STAFF:** The model should be communicated to staff as a great opportunity for professional development and knowledge building but also as a privilege for which not everyone will qualify. It should be made clear that participation in the initiative is not a guarantee of reward or promotion, but rather a learning opportunity. Though not all staff will be involved in the initiative, all should be informed to ensure clarity and cooperation. The value of the model and the commitment from senior management should be made clear.

## TEMPLATE FOR ANNOUNCING THE INITIATIVE

We are pleased to announce that {INSERT COMPANY NAME} will be implementing a **mentorship program** aimed at helping women in STEM (Sciences, Technology, Engineering and Mathematics). The goal of this program is to assist women with STEM backgrounds to advance in their careers and contribute toward a more level corporate playing field by encouraging women’s participation at all levels of responsibility within the organization.

Studies show that women with STEM backgrounds are still not advancing at the same rate as their male counterparts, or, are leaving the industry early. We want to make a difference, and here’s how we’re going to do it...

*ADVANCE: The Mentorship Model for Women in STEM* is sponsored by our executive team and supported by managers and supervisors. This program is a great opportunity for professional development and knowledge building, for all parties. As we pilot the program, the selection of potential mentees will be done by senior management, and therefore only a few women will be invited to participate at this time.

The mentorship program is done voluntarily, based on trust, focused on defining and achieving the mentee’s professional goals. The mentor teaches how to build skills and develop behaviors that will allow the mentee to make sound business and professional decisions on their own.

Mentors will be sourced both internally and, where appropriate, from external partners. The mentorship program is scheduled to last for 6 months, and will be supported with a timeline, terms to be agreed upon between the mentee and mentor; as well as custom software developed to enter progress and feedback.

To find out more about this program, we will be holding an information session on {INSERT DATE/LOCATION} – anyone and everyone is welcome to attend.

## MENTEE APPLICATION

Following the announcement of the mentoring initiative, companies should invite targeted female employees working in STEM or with STEM backgrounds to register their interest, perhaps through an application form (sample below):

<b>Mentee Application Form</b>	
<b>Name:</b>	<b>Email:</b>
<b>Work #:</b>	<b>Cell:</b>
<b>Job Title:</b>	<b>Department /Division:</b>
<b>Years in current position and major responsibilities:</b>	<b>Details of Direct Supervisor</b> <b>Name:</b> <b>Email:</b> <b>Work #:</b>
<b>Brief description of your professional objectives/goals</b> (Your goal is your vision of where you would like to be in a certain period of time. It is suggested that goals be set as a series of short term accomplishments, which may or may not successively progress towards a broader long-term objective)	
<b>What are your objectives in a mentoring relationship?</b> (Identify what you are seeking to achieve in a mentoring relationship. Describe the key learning objectives or competencies you would like to develop. Your objectives should be specific, measurable, action-oriented, realistic, and time-specific. For example, guidance on establishing effective working relationships with select members of the executive team)	
<b>What are your expectations from a mentor?</b> (Describe what you expect from your mentor, and how your mentor can assist you in achieving your objectives. Are you seeking a mentor who holds a particular position or has specific experience?)	
<b>Describe your ideal mentor in terms of job title, role, level</b> (You can put forward the names of known individuals inside or outside of the company for consideration)	

Applications will be collected and assessed by senior management.

## CRITERIA FOR PARTICIPATION: MENTEES

To make the most out of the mentoring initiative, we have included suggested criteria for selecting participants. Participating companies may, of course, modify these criteria to suit their objectives.

- Candidates should identify as women (cis/trans)
- Duties within the company are STEM related

- Educational background ideally STEM related
- Employed and working in STEM industry, ideally for a minimum of 5 years
- Seeks advancement, committed to self-improvement, goal-oriented
- Able to commit to a minimum 6-month mentorship period, with the possibility of renewal

Senior management should select participants based on alignment with these criteria as well as any company-specific objectives; not all women invited to participate may choose to submit an application, and not all women who submit an application may be selected.

Though selection can be a process and discussion between senior management, one member of the executive team should be nominated to have the final decision-making power on all applications.

**THOSE NOT SELECTED:** Immediate supervisor should meet with those women who are not selected to provide reasoning and guidance on how they can improve their candidacy for future mentorship opportunities.

**SUCCESSFUL APPLICANTS:** Executive sponsor should meet with the individuals selected to participate in the model and discuss the following topics:

- Why the candidate has been chosen and what potential the executive team recognizes in them
- Recommend areas, skills or competencies where development would be beneficial to the individual and organization. Mentees may choose to link these to their goals/objectives.
- Expectations of the candidate in terms of commitment to the process and their role as mentee
- Discuss perspectives on the ideal type of mentor for the individual and prospective candidates
- Provide 'Moving Forward: Mentee' document

## MOVING FORWARD AS A MENTEE

Helpful information can be shared with the mentee via email to formalise her participation and help her engage with her role and responsibilities.

### MOVING FORWARD AS A MENTEE

Congratulations! You have been selected to participate in the mentorship program.

You will shortly receive your log-in information for the ADVANCE website. It is recommended that you update your password when logging-in for the first time.

Please review this useful information in lead up to being matched and

#### YOUR ROLE AS MENTEE

A mentee is open to new ideas and is willing to learn and develop skills that will help her make good career decisions and reach the goals established at the start of the relationship. For a mentoring relationship to succeed, it is important that a mentee understand her role.

- **Be pro-active:** Initiate regular contact with your mentor and participate fully in the mentoring sessions. As the mentee, it is your responsibility to schedule meetings and set the agendas. You will only get out of this relationship as much as you put in. Always follow through on your mentor's suggestions.
- **Know yourself:** Know your strengths, weaknesses and capabilities. Be familiar with your goals and objectives, and what obstacles you foresee. Present a clear picture of yourself to your mentor.

- **Share honestly:** Try not to hold back pertinent information from your mentor. The more truthful you are, the better able your mentor will be to help.
- **Ask questions and listen carefully to your mentor's answers:** If you don't ask questions, how will you find out the answers? Mentoring is your chance to find out everything you have ever wanted to know about a particular subject. You might not always like the answers provided, but always listen attentively.
- **Be prepared:** Do your homework between meetings. Create meeting agendas. Plan ahead for upcoming meetings, and be prepared to approach your mentor with new questions, challenges, and even possible solutions.
- **Show appreciation:** Your mentor is volunteering his/her time, so show your appreciation of their efforts. Say and express your thanks for their help.
- **Respect boundaries:** Your mentor is a busy professional, be consistent with your correspondence without inundating them. Respect the rules of engagement as agreed with your mentor in the beginning of your relationship. Accept that they may have busy periods where they may not be able to be as responsive.
- **Reciprocate.** Mentorship is a two-way street. Think about ways you can help your mentor and even ask if there are ways you can contribute to their agenda.
- **Report on progress:** When required, report on progress and provide feedback on the initiative via the online platform.

### YOUR MENTORING GOALS:

You should think carefully and honestly about what you want to achieve from the mentoring relationship. Where possible objectives should be SMART: specific, measurable, action-oriented, realistic, and time-specific. Guidance can be sought from senior management in terms of linking your personal career development goals with those of the team or company.

The following high-level categories have been predetermined within ADVANCE to help guide the process of goal setting.

- Communication
- Leadership
- Networking
- Skill Development
- Other

Within these categories you can identify more specific objectives. It might be helpful to consider the following when thinking about possible short and long-term development goals and how you might assist progression in these areas:

- Reconciling short-term deliverables with longer-term objectives
- Achieving greater awareness and recognition among members of senior management, (non-financial) recognition of your work and achievements
- Career advancement with current employer
- Establishing working relationships with specific members of senior management
- Expanding external network
- Improving networking skills
- Navigating the political landscape/political skills at the workplace
- Greater understanding of your organization's structure, notably the decision-making process
- How to better market yourself internally and externally
- Improving work-life balance



- Identifying strategies that can both advance your agenda and contribute to achieving your organization's goals, and how to implement them
- Looking at your competencies and skills from senior management's view and identifying which ones are most effective/needed/helpful

## ROLES & RESPONSIBILITIES

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### THE ORGANIZATION:

#### ROLE OF SENIOR MANAGEMENT

Senior executives are the owners, sponsors and ambassadors for the mentorship model. They champion the initiative and promote the positive effects of mentorship for the individual, for the team and for the company as a whole.

Senior management will be expected to:

- Share information about the model and its benefits
- Participate actively as mentors
- Select internal staff to become mentees, if applicable
- Help recruit, assess and approve mentor candidates (internal and external)
- Ensure accountability of participants (link participation to performance evaluations)
- Take an active role in any networking or training activities for mentors or mentees
- Evaluate term end reports, determine if mentees have made progress and if the continuation of relationships is appropriate and of benefit
- Report outcomes of the model, headway mentees are making in meeting their goals, return on investment, back to management team.

#### ROLE OF HR

Human Resources staff will provide organizational and administrative support during the implementation and course of the initiative. They will be implicated in activities including:

- Work with senior management to announce the initiative and communicate the goals and processes of the model
- Monitor applications from both mentees and mentors, ensuring relevant information is provided
- Assist in the recruitment of mentees and mentors, at the direction of senior management
- Facilitate access to the ADVANCE online tool (create profiles, manage relationships, track progress)
- Coordinate external resources, such as mentors from other organizations or support from external partner
- Help communicate roles and responsibilities to mentees and mentors, including tracking and reporting duties
- Provide updates and participation information to senior management so they may take into consideration when looking at performance of mentees
- Help coordinate events and activities that senior management might want to introduce to add value to mentors/mentees (networking, training events)
- Assist in running reports requested by senior management in terms of the goals set by mentees and their progress towards meeting them, tracking meetings, time invested by participants etc...

## ROLE OF EXTERNAL PARTNER

For the purposes of the pilot, YES is recognized as the external partner. The external partner will:

- Be an information resource and lighten administrative burden of the host company
- Support implementation of the model and monitor stakeholder feedback throughout the pilot process
- Make required updates or modifications to the model based on feedback (iterative process)
- Assist in recruiting mentors from external, appropriate companies (provide situational context for external companies/mentors)
- Act as mediator for any conflicts of interest that arise between companies/participants
- Coordinate outside evaluator as they measure initial baseline for company(s), mentors and mentees (pre-implementation of model) and as they measure progress of company(s)/participants at the 6 month mark (and any future evaluations)

## THE PARTICIPANTS:

### ROLE OF A MENTOR

A mentor is an adviser, teacher and role-model. A mentor helps a mentee develop the skills, knowledge and expertise she needs to make good business and career decisions. For a mentoring relationship to succeed, it is important that the mentor understand his/her role.

**Listen:** The most important role a mentor will play is as a sounding board for the mentee. A mentor should listen actively, patiently, and attentively as the mentee voices her opinions.

**Build Trust:** The cornerstone of any relationship is trust, and mentoring is no different. A mentor is responsible for gaining the mentee's trust. Among other things, a mentor should always follow through on promises made to his/her mentee.

**Share your experiences, both positive and negative:** Your mentee will learn as much from your failures as from your successes. Share openly and honestly.

**Provide constructive feedback:** In order to build a respectful and open relationship, a mentor should provide constructive feedback. Be conscious of how you provide feedback so that it does not come across as criticisms.

**Offer advice and challenge your mentee to make good decisions:** Your role as a mentor is not to tell a mentee what to do, or to take actions on behalf of the mentee. Ask questions and make suggestions that will lead the mentee to make good decisions on his/her own.

**Introduce your mentee to new situations and experiences:** Wherever possible, invite your mentee to participate in networking events or other activities that will help broaden their network and knowledge base.

**Report on progress:** When required, provide reports on mentees progress and the feedback on the initiative via the online platform.

## ROLE OF A MENTEE

A mentee is open to new ideas and is willing to learn and develop skills that will help her make good career decisions and reach the goals established at the start of the relationship. For a mentoring relationship to succeed, it is important that a mentee understand her role.

**Be pro-active:** Initiate regular contact with your mentor and participate fully in the mentoring sessions. As the mentee, it is your responsibility to schedule meetings and set the agendas. You will only get out of this relationship as much as you put in. Always follow through on your mentor's suggestions.

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**Respect boundaries:** Your mentor is a busy professional, be consistent with your correspondence without inundating them. Respect the rules of engagement as agreed with your mentor in the beginning of your relationship. Accept that they may have busy periods where they may not be able to be as responsive.

**Reciprocate.** Mentorship is a two-way street. Think about ways you can help your mentor and even ask if there are ways you can contribute to their agenda.

**Report on progress:** When required, report on progress and provide feedback on the initiative via the online platform.

# MENTORS

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## RECRUITING INTERNAL MENTORS:

Potential mentors should be identified within the company by senior management, in collaboration with HR, and invited to participate in the model. Senior management should lead the initiative, ideally by becoming mentors themselves. In addition, individuals who are advanced in skill, experience and/or seniority within the company would be ideal candidates. The talent development needs of the company, together with the roles and needs of mentees, will influence the mentors selected by each participating company. Mentees can also propose candidates as potential mentors for senior management's approval.

The benefits of mentoring for the organization, team and individual mentor should be communicated clearly. The specific benefits to mentors include:

- Building leadership abilities
- Improving communication skills
- Learning new perspectives
- Growing network
- Gaining recognition from colleagues and superiors
- Personal fulfilment in seeing mentee progress
- Potential advancement of own career as the process helps hone managerial skills

## RECRUITING EXTERNAL MENTORS:

Where there are no available mentors within the host company or a 'good match' for a particular mentee, or confidentiality issues, mentors may be approached from external, approved, organizations. For the purposes of the pilot, there will be a collaboration with YES' project coordinator who can help facilitate the recruitment of potential external mentor candidates.

The host company can identify traits and individuals who would be a good fit. The project coordinator can approach the individuals, furnish them with information about the model, host company and potential mentee, and connect the mentor with senior management at the pilot company.

All potential mentors should be asked to complete the 'Mentor Candidacy' form or similar documentation.

Mentor Candidacy	
Name:	Email:
Work #:	Cell:
Job Title:	Department/Division:
Years in current position and major responsibilities:	Details of direct supervisor Name: Email: Work #:
Describe your professional career background in a few words (main roles, technical skills, responsibilities, managerial experience)	

What experience and expertise could you offer a mentee?	
Describe your ideal mentee in terms of job title, role, level:	
Are you willing to commit to a 6 month minimum mentoring match?	

## SELECTING MENTORS:

Selection can be a process and discussion between the senior management team of the pilot company; however one member of the executive team should be nominated to have the final decision-making power on which mentors to approach and select.

'The Role of a Mentor' guidelines (p.9) should be considered when assessing individuals as to whether they would be a good fit to become a mentor.

## INCENTIVES FOR MENTORS:

Where possible, participation in the model and commitment to their role as mentor, should be reflected in their performance evaluations. Appropriate company incentives can be offered to mentors who commit to the program such as networking opportunities, internal recognition via company newsletters, and other types of rewards or compensation.

Where a mentor from an external company is involved, no formal process can be put in place by the host company in regards to the mentor's performance evaluation. Incentives may still be offered, such as a 'letter of recognition' that the mentor could pass on to their employer, access to networking activities or invitations to appropriate training events.

These types of incentives will make mentors accountable for their commitment and also encourage their prolonged participation in the model.

## MOVING FORWARD AS A MENTOR

Helpful information can be shared with the mentor via email to formalise their involvement and help them engage with their role and responsibilities.

### MOVING FORWARD AS A MENTOR

Many thanks! You have been selected to participate in the mentorship program.

You will shortly receive your log-in information for the ADVANCE website. It is recommended that you update your password when logging-in for the first time.

While we are identifying a mentee for you, we wanted to leave you with information that will be useful to consider in the lead-up to being matched:

#### **WHAT IS MENTORING?**

Mentoring is a relationship where an experienced person (a mentor) shares his/her knowledge, expertise and experience with a less experienced person (a mentee) who is willing to learn and benefit from this exchange.

Mentoring focuses on the mentee as a learner, who is working toward achieving specific goals as part of the mentoring process.

***Mentoring is:***

- Voluntary
- Trust-based
- Focused on defining and achieving the mentee's professional goals
- Mentee-driven and mentor-supported
- Productive and beneficial for both mentors and mentees
- An on-going active collaborative relationship

***Mentoring is not:***

- An obligation
- A relation of power
- A one-way relationship
- A private course or coaching session
- A personal counseling or therapy session
- A rigid process with strict instructions

**YOUR ROLE AS MENTOR**

A mentor is an adviser, teacher and role-model. A mentor helps a mentee develop the skills, knowledge and expertise she needs to make good business and career decisions. For a mentoring relationship to succeed, it is important that the mentor understand his/her role.

**Listen:** The most important role a mentor will play is as a sounding board for the mentee. A mentor should listen actively, patiently, and attentively as the mentee voices her opinions.

**Build Trust:** The cornerstone of any relationship is trust, and mentoring is no different. A mentor is responsible for gaining the mentee's trust. Among other things, a mentor should always follow through on promises made to his/her mentee.

**Share your experiences, both positive and negative:** Your mentee will learn as much from your failures as from your successes. Share openly and honestly.

**Provide constructive feedback:** In order to build a respectful and open relationship, a mentor should provide constructive feedback. Be conscious of how you provide feedback so that it does not come across as criticisms.

**Offer advice and challenge your mentee to make good decisions:** Your role as a mentor is not to tell a mentee what to do, or to take actions on behalf of the mentee. Ask questions and make suggestions that will lead the mentee to make good decisions on his/her own.

**Introduce your mentee to new situations and experiences:** Wherever possible, invite your mentee to participate in networking events or other activities that will help broaden their network and knowledge base.

**Report on progress:** When required, provide reports on mentees progress and the feedback on the initiative via the online platform.

**GOAL SETTING**

At your first formal meeting, you will work together with your mentee to establish career development objectives that you will help them progress towards over the course of your relationship. You will be able to set tasks and action items between meetings to help your mentee work towards their broader goals.

Your mentee may need input in terms of setting realistic goals that will help them advance their career and you must consider what areas you are able to actively help.

The following high-level categories have been predetermined within ADVANCE to help guide the process of goal setting.

- Communication
- Leadership
- Networking
- Skill Development
- Other

Within these categories you can identify more specific objectives. It might be helpful to consider the following when thinking about possible short and long-term development goals and how you might assist progression in these areas:

- Reconciling short-term deliverables with longer-term objectives
- Achieving greater awareness and recognition among members of senior management, (non-financial) recognition of your work and achievements
- Career advancement with current employer
- Establishing working relationships with specific members of senior management
- Expanding external network
- Improving networking skills
- Navigating the political landscape/political skills at the workplace
- Greater understanding of your organization's structure, notably the decision-making process
- How to better market yourself internally and externally
- Improving work-life balance
- Identifying strategies that can both advance your agenda and contribute to achieving your organization's goals, and how to implement them
- Looking at your competencies and skills from senior management's view and identifying which ones are most effective/needed/helpful

## MATCHING PROCESS

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Matching of mentor and mentee should be at the discretion of the senior management of the mentees' company and should be based on relevant skills and competencies, in alignment with company objectives and talent development needs. It is recommended that an executive team is established and meets to:

- Identify candidates with advancement potential and encourage application
- Identify potential mentors and encourage participation
- Review applications from mentees/mentors and choose successful candidates
- Make appropriate matches

When candidates have been selected and a good match identified, the mentee's profile should be shared with the mentor for consideration. Following the mentor's acceptance to continue, communication should be sent to each party confirming the next steps.

### WELCOME TEMPLATE FOR MENTEE:

Thank you for your interest in the mentoring program: ADVANCE: The Mentorship Model for Women in STEM. We are excited to welcome you to the 2016 program as a mentee and have listed the name of your mentor below:

YOUR MENTOR IS: {insert Name, Position, and Function}.

During the matching process we gave careful consideration to the desired attributes you requested, your willingness to commit to the program for 6 months, and your strong performance contributions to the company.

While cannot guarantee a "perfect match" in all respects, we are confident that we addressed the most important characteristics and made a fitting match for you.

In connecting more senior executives with mentees, our goal is that a relationship of guidance and mutual learning results. Your mentoring relationship should last at a minimum for six months. You should allocate time for at least one meeting with your mentor each month and allow for informal exchanges in between (email correspondence, quick calls). Should you have any concerns about your commitment to the program, please let us know immediately.

INITIAL MEETING WITH MENTOR: {insert date, time, location}.

During this first meeting, you and your mentor will get to know each other better, you will discuss your expectations for each other as well as the program and set your development objectives. You will both complete the 'Mentoring Agreement' and consent to the 'Code of Ethics' via the online system.

We look forward to your participation in the mentoring program. If you have any questions, please contact {include name and contact information}

### WELCOME TEMPLATE FOR MENTOR:

Thank you for your interest in the mentoring program: ADVANCE: The Mentorship Model for Women in STEM. We are pleased to inform you that you have been selected as a mentor to participate in the program.

The purpose of this program is to establish a mentoring relationship that will provide you with the opportunity to realize both professional and personal development as well as assist a woman in the STEM sector to achieve her goals.



The selection to participate was based on a variety of criteria, including:

- ability to build relationships
- proof of leadership capability
- accomplishments that have resulted in moving the business forward and have distinguished you from your peers
- genuine interest in people and their growth.

You have been assigned {insert name of mentee} as a mentee who will partner with you along the way. *{Your manager has been informed of your selection. -INTERNAL MENTORS ONLY}*

It is our sincere hope that this mentoring program be a rewarding experience for both you and your mentee.

We look forward to your participation in this mentoring program and seeing how your mentee develops with your guidance. If you have any questions, please contact {include name and contact information}

## STEP-BY-STEP MATCHING PROCESS

### MENTEE PROFILE SHARED WITH MENTOR

The potential mentor is provided with the mentee's profile based on information they provided in their application form (role, division, objectives, expectations) and asked to indicate if they are willing to enter into a mentoring relationship with them. (If the mentor refuses at this stage then another candidate is sought to be matched with the mentee.)

### MENTOR ACCEPTS

If the mentor accepts, then the mentee is contacted and provided with mentor's name, role and company. The mentee is not given the right of refusal, except in instances where there is an established personal connection or conflict of interest.

### INITIAL MEETING

Both parties are invited to connect for an initial meeting so they may be introduced, discuss mutual expectations of the program and of each other, and establish goals. Both mentee and mentor are given this opportunity to meet to ensure a good fit before consenting to a match. (If a 'good fit' is not established between mentor and mentee the process can be halted and the mentee will return to the 'waiting list' while another mentor candidate is sourced.)

### MENTORING AGREEMENT

If both parties agree to move forward with the match, the remainder of the first meeting is focused on the *'Mentoring Agreement'* (Appendix 1) which sets out general guidelines that govern the relationship, including the frequency, duration and location of meetings, and contact information. The most important function of the Mentoring Agreement is to record the mentee's goals, which should be specific, measurable, action-oriented, realistic, and include a deadline. Since the YES Mentorship Model is goal-oriented, the Mentoring Agreement can be referred to at any time during the relationship to measure the progress and success of the relationship.

### CODE OF ETHICS

Mentors and mentees will also review and sign the *'Code of Ethics'* (Appendix 2) document which addresses ethical issues including conflict of interest and confidentiality

### SCHEDULE NEXT MEETING

Once the documentation has been signed, the next meeting should be scheduled. The mentee will be obliged to follow up with the mentor to confirm the meeting date/time, propose the agenda for the meeting and note any questions they may have for the mentor.

### TRACK PROGRESS

The match is recorded on the electronic system. A short progress report is requested at the 3-month mark and for the purposes of the pilot, a more in depth assessment of progress will take place at the 6-month mark. Mentoring relationships are encouraged to continue and be renewed for an additional 6-month period

### EXIT STRATEGY

If the relationship should break down, or an individual have a conflict or recognize a true incompatibility, then senior management can be informed and HR can assist in bringing the match to an end and assessing if it is appropriate to seek new mentor/mentee candidates.

## GOAL SETTING FOR MENTORS & MENTEES

Mentoring goals should be determined early in the relationship and both mentor and mentee should contribute to the goal-setting process. It is suggested that goals be set as a series of short term accomplishments, which may or may not successively progress towards a broader long-term objective.

Mentees should think carefully and honestly about what they want to achieve from the mentoring relationship. Where possible, objectives should be SMART: specific, measurable, action-oriented, realistic, and time-specific. Guidance can be sought from senior management in terms of tying personal career development goals with those of the team of organization.

The tool sets out 5 high-level categories within which your objectives can be placed.

- Communication
- Leadership
- Networking
- Skill Development
- Other

Most professional objectives will fit into the first 4 outlined categories. Where a goal sits outside of these, the 'other' category can be utilised. Company's can monitor these high-level categories to identify focus areas for their mentees and use this information to implement trainings and initiatives to speak to any trending needs.

Discussion topics for mentee/mentor that may lead to identification of realistic short, medium and long-term objectives:

- Reconciling short-term deliverables with longer-term objectives
- Achieving greater awareness and recognition among members of senior management, (non-financial) recognition of your work and achievements
- Career advancement with current employer
- Establishing working relationships with specific members of senior management
- Expanding external network
- Improving networking skills
- Navigating the political landscape/political skills at the workplace
- Greater understanding of your organization's structure, notably the decision-making process
- How to better market yourself internally and externally
- Improving work-life balance
- Identifying strategies that can both advance your agenda and contribute to achieving your organization's goals, and how to implement them
- Looking at your competencies and skills from senior management's view and identifying which ones are most effective/needed/helpful

## EXIT STRATEGY

Every 6-month assessment period represents an opportunity to renew or end a mentoring relationship. If relationships come to a premature end then it is important to handle with care and consideration so both parties have the opportunity to assess and learn from their experience.

Closure protocols are similar for both anticipated and unforeseen relationship conclusions. We recommend a 4-step process to formally ending the mentoring relationship:

1. Final Meeting of mentee and mentor to review the relationship, progression on goals and look at factors that contributed to making the continuation of the relationship ineffectual or unrealistic
2. Term-End Assessment Report submitted via online system by both mentor and mentee
3. 'Terminating the Mentoring Relationship' form completed online
4. Individual exit interviews set up with senior management to review the terms of termination, the contribution of the mentor, the progress made by the mentee and receive feedback from both on the process. Where appropriate, the possibility of re-matching the mentee can be explored.

Where relations are less 'amicable', parties may skip step 1 and advance through the remaining actions. The company's standard HR policies regarding conduct can be consulted where appropriate.

The support of HR will be vital in the process of ending relationships so the appropriate procedure can be followed and the right information documented.

### TERMINATING THE MENTORING RELATIONSHIP

As your mentoring relationship draws to a close, take time to reflect on what you have learned and gained from the mentoring experience and what you may do differently in future.

Mentee  Mentor

Name:

Goal Date to End Formal Relationship:

Please list the reason(s) for terminating the mentoring relationship:

What progression did you/your mentee make on the initial mentoring goals:

What would you do differently in your next mentoring relationship?

Do you have feedback to share with organizers of the mentoring initiative?

Mentor – would you like to be re-matched?  Yes  No

Mentee – would you like to be re-matched?  Yes  No

## REPORTING STRUCTURE

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Tracking progress is vital to the development of the mentorship model and the success of each individual match. Metrics are needed to demonstrate the overall effectiveness of the model, maintain much needed support and sustain the initiative.

The impact of the mentorship model can be assessed based on various indicators:

### Retention

- Number of high potential women mentored
- Number that remain in the company
- Comparison with those not mentored

### Talent Development

- Do direct managers notice an improvement in skills?
- Have mentored women met or made progress with their goals?
- Do these women feel more confident and capable in their work?
- Women have shared what they have learned with their colleagues?

### Improved Productivity

- Can managers identify improvement in mentees output?
- Have mentored women taken on additional tasks or more responsibility?

### Advancement

- Have mentored women been promoted?
- Have they received additional compensation? (raise, bonus, perks)
- Have they been recognised formally for their work?
- Do women see opportunities for advancement that they can reach for?

### Motivation & Satisfaction

- Do women feel more satisfied in their role within the company?
- Are women more motivated to stay with their current employer?

## DATA

The online tool is easy and convenient to access. The tool will house data including:

- A selection of forms including mentoring agreement, code of ethics, termination of relationship, surveys etc...
- Mentor and mentee profiles
- Matches made, link mentor and mentee profiles
- The objectives each mentee will work towards
- Track monthly meetings between mentors and mentees
- Homework/action items set by mentor and a record the mentee's progress in achieving them
- Guidelines for the program, training materials, best practices and links to external resources that might be useful

## TRACKING

Data should be entered at regular intervals, by both mentee and mentor. Compulsory progress reports should be done every 6 months but participants should have the ability to record progression and give feedback more frequently if desired. Data collection intervals include:

### Application:

- Mentee Application Form
- Mentor Application Form

### Matching:

- Mentee/Mentor profiles linked
- Objectives recorded
- Mentorship Agreement Form
- Code of Ethics
- Training documents/roles & responsibilities reviewed

### Progress:

- Confirmation of meeting dates and length
- Homework assigned (linked to broader objectives)
- Homework completed

### 6-Month Assessment:

- Progress reports from mentor and mentee
- Evaluation by senior management and recommendations for moving forward (renew/terminate relationship)
- Program evaluations from mentor/mentee

### For purposes of the pilot:

- The Project Evaluator will survey & interview management, mentees and mentors to take a baseline prior to implementation of the model
- The YES Project Coordinator will check in at regular intervals with both mentors and mentees to collect feedback and track progress
- The Project Evaluator will survey & interview management, mentees and mentors and compare data collected to initial baseline. This will allow accurate evaluation of the effectiveness of the initiative.
- These results will inform the formal, final reporting structure of the model

## ACCOUNTABILITY

Each individual must be held accountable for their contribution to the reporting process and understand that their input will affect the broader, organizational goals for the program as a whole:

**Mentees** are responsible for recording their objectives, scheduling and recording meetings, completing assigned homework and taking part in the 6 month assessment.

**Mentors** are responsible for tracking the progress of mentees, recording if they complete tasks assigned to them and submitting reports as part of the 6 month assessment. Contribution by mentors will be taken into account within their performance evaluations.

**HR** will monitor submissions by mentor and mentee and flag inconsistencies in reporting with senior management. HR will be a support to which mentee and mentor can report any interpersonal issues. Reports can be generated from the tool and provided to senior management so they can assess the effectiveness of each mentoring match, the model as a whole and the ROI of the initiative.

**Senior Management** are responsible for assessing the success of the model. They should use reports generated from the tool together with interviews with implicated staff to gauge if the broader goals of the model are achieved; retention, talent development, improved productivity, advancement and improved motivation & satisfaction.

## ROLE OF EXTERNAL PARTNER

For the purposes of the pilot, YES is recognized as the external partner. The role of the external partner will entail:

- Coordinate outside evaluator as they measure initial baseline for company(s), mentors and mentees (pre-implementation of model)
- Support implementation of the model and monitor stakeholder feedback throughout the pilot process
- Make any required updates or modifications to the model based on feedback (iterative process)
- Assist in recruiting mentors from external, 'complimentary' companies (provide situational context for external companies/mentors)
- Act as mediator for any conflicts of interest that arise between companies/participants
- Coordinate outside evaluator as they measure progress of company(s)/participants at the 6 month mark (and any future evaluations)

## PILOT ASSESSMENT STRUCTURE FOR STATUS OF WOMEN CANADA

For the purposes of the pilot, the project and model will be assessed by an outside evaluator with a focus on the following key Indicators:

1. Analysis of the alignment of the needs assessment with the development and implementation of model
2. Analysis of the model's relevancy and appropriateness in meeting the needs of women
3. Analysis of nature of mentorship model in addressing dimensions of: effectiveness (results statements), and potential for advancement of women
4. Stakeholders/partners knowledge of opportunities and barriers for women
5. Analysis of the nature of active opportunities created to educate different stakeholders/partners
6. Nature of women's active engagement in advancing issue(s) within their organization
7. Analysis of organizational uptake of model piloted (e.g. organizational support through resource dedication, defined roles and responsibilities, leadership, infrastructure)

8. Analysis of sustainability of mentorship model within partner organization(s)
9. Stakeholders' perceptions about what worked well in sustainable model development and implementation
10. Stakeholders' perceptions about what did not work in sustainable model development and implementation

Assessment methods will include:

- Program documentation
- Interviews with project coordinator and working group
- Interviews with company representatives and mentorship model participants
- Survey and/or focus group with other stakeholders



## PROPOSED IMPLEMENTATION TIMELINE:

<b>WEEK 1</b>	<ul style="list-style-type: none"> <li>Executive team established to lead the mentorship model</li> <li>HR involvement commences</li> <li>Meet to review model documentation, tool and go over implementation schedule</li> <li>Elect a 'project lead' to have final decision making power on applications and matches</li> </ul>
<b>WEEK 2</b>	<ul style="list-style-type: none"> <li>Senior executive to announce program through -staff email and share application facility for mentees/mentors and give two week deadline</li> </ul>
<b>WEEK 3</b>	<ul style="list-style-type: none"> <li>Executive team announce their involvement in the model as mentors and;</li> <li>Ask managers/supervisors to reach out to staff identified to have advancement potential and encourage to apply if they have not yet already done so</li> <li>Approach those seen to be good mentor candidates and encourage their involvement</li> <li>Pool ideas for external mentor candidates and identify companies where external mentors could be sourced. Share this information with HR</li> </ul>
<b>WEEK 4</b>	<ul style="list-style-type: none"> <li>HR collates mentee/mentor applications and shares with executive team</li> <li>Executive team meets to shortlist mentee candidates, mentors and determine if suitable matches can be made. Shares outcomes with HR</li> </ul>
<b>Week 5</b>	<ul style="list-style-type: none"> <li>Meetings arranged with both unsuccessful and successful candidates to discuss decision and next steps</li> <li>Successful mentees/mentors given leave-behind documents</li> <li>Mentors receive the profiles of proposed mentees and asked to commit</li> <li>Where appropriate, when mentors are not available internally, senior management determines needed 'profiles' and communicates with HR</li> <li>HR can work with external partner and identified companies to gather profiles of possible mentor candidates</li> </ul>
<b>Week 6</b>	<ul style="list-style-type: none"> <li>HR helps schedule Initial meetings of mentors/mentees</li> <li>Participants agree to be matched and complete appropriate steps on the tool (mentoring agreement, code of ethics, determine goals...), their profiles are linked and next meeting set</li> <li>If participants do not agree to be matched the they must report back to HR, who will advise executive team that re-matching is required</li> </ul>
<b>Week 7</b>	<ul style="list-style-type: none"> <li>Executive team meets to review matches made and those outstanding. With the support of HR finds suitable alternatives for unmatched participants</li> </ul>
<b>Week 7-10</b>	<ul style="list-style-type: none"> <li>2<sup>nd</sup> Meeting of mentors/mentees take place</li> <li>Homework set</li> </ul>
<b>Week 11-14</b>	<ul style="list-style-type: none"> <li>3<sup>rd</sup> Meeting of mentors/mentees take place</li> <li>Homework reviewed and reset</li> </ul>
<b>Week 15-18</b>	<ul style="list-style-type: none"> <li>4<sup>th</sup> Meeting of mentors/mentees take place</li> <li>Homework reviewed and reset</li> </ul>
<b>Week 19-22</b>	<ul style="list-style-type: none"> <li>5<sup>th</sup> Meeting of mentors/mentees take place</li> <li>Homework reviewed and reset</li> </ul>
<b>Week 23-26</b>	<ul style="list-style-type: none"> <li>6<sup>th</sup> Meeting of mentors/mentees take place</li> <li>Assess progress on meeting established goals</li> <li>Discuss the continuation of the relationship : choose to renew or end</li> <li>Renewal or termination of the relationship via tool</li> </ul>
<b>Week 27</b>	<ul style="list-style-type: none"> <li>HR generates reports from the tool and shares with executive team</li> <li>Executive team representatives meet with mentors/mentees to discuss progress and gain feedback on the initiative. Discuss renewal or termination of relationships</li> </ul>
<b>Week 28</b>	<ul style="list-style-type: none"> <li>Executive team meet to analyse the success of the program in terms of meeting established, broad goals and ROI</li> </ul>

# APPENDIX 1: OFFLINE MENTORING AGREEMENT

## Mentoring Agreement

Mentee: \_\_\_\_\_ Mentor: \_\_\_\_\_

### Mentoring Commitments:

At its most basic level, mentoring is the passing on of skills, knowledge and wisdom from one person to another.

Duration of Mentoring Relationship: **6 months**

Quantity of meetings: **6 meetings minimum**

Duration of meetings: **1-2 hours**

### Objectives

The Advance Mentorship Model is goal-based. The mentee is responsible for setting clear goals and objectives for the duration of the match to guide the mentoring process. These goals/objectives should be learning based. The end result should be that the mentee has a clearer understanding of their organization, their career development process, and the steps that they should take to achieve their short and long-term career objectives.

### How Can a Mentor Prepare?

Assess your experiences: Mentors should reflect on the significant events in their lives, their successes and failures, the obstacles they encountered and the lessons they learned along the way.

### Making Efficient Use of Time: Mentee

- Schedule meetings in advance
- Be serious and diligent about scheduling and keeping appointments and returning emails and phone calls.
- The quality of time spent together is more important than the quantity; focus on the issues at hand and prepare an agenda if relevant
- Maximize the time spent together by fully preparing for any discussions or meetings. If appropriate, start each discussion with a progress review or update.

### Factors to bear in mind as your relationship progresses:

- Are we on track to reach the goals of our mentoring relationship?
- What do I think about my mentor/mentee?
- What is working well and why?
- What could be working better?
- How well are we communicating?

### Confidentiality:

All matters discussed in the course of the relationship shall be confidential, unless both parties agree that disclosure can occur. This includes all mentions of company related issues and data.

### Disclaimer:

The mentee understands that she is responsible for individually and independently satisfying herself of the soundness of any suggestions, recommendations, or advice-like comments made by the mentor.

By your signature of this document, you hereby release and agree to indemnify and hold harmless YES & *INSERT COMPANY NAME(S)* and their employees from any liability or responsibility for damages of any kind that may result from your participation in the mentoring program.

\_\_\_\_\_  
Signature of Mentor

\_\_\_\_\_  
Signature of Mentee

\_\_\_\_\_ Signature Mentorship Coordinator

Date: \_\_\_\_\_

Place: \_\_\_\_\_

## APPENDIX 2: CODE OF ETHICS EXAMPLE

### Code of Ethics

Mentee: \_\_\_\_\_ Mentor: \_\_\_\_\_

The success of the mentoring process rests on the respect of a Code of Ethics whose primary goal is to preserve the relationship of confidence between the mentor and the mentee (and their organizations).

#### BASIC PRINCIPLES (ETHICS) FOR THE MENTORING MODEL

##### Act in the interest of the mentee:

- The mentor must act, in their mentoring activities, in such a manner as to place the interest of the mentee first.
- If a mentor or mentee is not capable of continuing his/her commitment, s/he must inform their mentorship coordinator so they may take appropriate measures.
- The mentors and the mentorship coordinator must, at all times, protect the confidentiality of information obtained from the mentees.

##### Conflict of interest:

- In the case where a mentor and a mentee work for different organizations, whether direct or indirect competition exists or not, the confidentiality of information shared between the mentor and mentee must be respected at all times.
- A mentor cannot participate or accept to accompany a mentee in such a way as to enter into conflict of interest with the mentee's employer, an associate or with another business in which there are financial interests or others.
- A mentor cannot recommend an action or a transaction to seek or propose the services or the products of his/her personal firms. Mentoring cannot be considered as a lever to develop the business of the mentor or vice versa.

##### Refuse all compensation or payment:

- A mentor is a volunteer. No advantage, no reward or financial compensation or other must be accepted in return for the accompaniment work associated with the support offered to a mentee.

##### Ethics of the relationship:

- The only persons responsible for the quality of the mentoring relationship are the persons involved in that relationship. In the event of a problem, it must at first be discussed by the persons directly concerned. If the difficulty persists, it is then possible to ask for the coordinator's help.

##### Collaboration and mutual aid:

- The mentoring relationship is under the seal of confidentiality. However, the coordinator, the mentor, and the mentee respect the volunteer intention of the project, support the network and the mentoring stakeholders with their collaboration and mutual aid. They accept to transmit certain information to the partners for the purpose of measuring the mentoring global results and therefore contribute to the development of a mentoring expertise in their environment

\_\_\_\_\_ Signature of Mentor

\_\_\_\_\_ Signature of Mentee

\_\_\_\_\_ Signature Mentorship Coordinator

Date: \_\_\_\_\_

Place: \_\_\_\_\_