
MENTORSHIP PROJECT

Mentor:

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I. Introduction

Between July 2001 and June 2003, the Canadian College of Health Service Executives (CCHSE) will be going through a significant transition in its senior management personnel. Over this two-year period, the College's three most senior positions will be vacated through retirement of the incumbents; in the same period of time, one new senior manager (Vice President) will join the College (September 2001).

It is strategically important for the College to develop an effective process for knowledge transfer that will ensure sustained pursuit of its vision and consistent delivery of high quality services to members.

It has been conceptually agreed by the College Board of Directors and the CEO (who will retire in 2003), that everything possible will be done to prepare the new Vice President to be the best candidate as the College's next President.

The new Vice President has been in senior leadership roles in a variety of organizations. She comes with significant experience in senior positions and in national health related associations.

This mentorship program, therefore, will not be exclusively focused on enhancing her leadership skills. It will also be focused on adapting her existing knowledge and expertise to the specific vision, mission, philosophy, goals, programs and services of the CCHSE.

In addition, it will focus on enhancing and adapting her existing skills to the College's governance model, its current and potential future strategic linkages and to the nuances of serving a corporate membership base.

The process of enhancing existing skills will be planned, implemented and monitored through a structured mentorship program.

II. Literature Review

Introduction

It is remarkable that most literature on Mentoring is quite recent. A comprehensive search on this topic reveals that, until about 1990, leadership and management books refer to mentoring only very briefly, or as a footnote.

Since 1990, the body of knowledge has increased dramatically. In itself, this is an indication of the importance now being given to the mentoring process as an integral part of leadership and management behaviour in successful organizations.

In this section of my Fellowship proposal, I intend to review and comment on four themes:

- (a) Various definitions of mentoring;
- (b) Various models of mentoring, including the different types of roles played by mentors under each model,
- (c) The benefits that accrue to the mentor, the mentee and the organization in these models;
- (d) A description of the preferred approach for the mentorship related in this Fellowship proposal.

Definitions

Myles Downey, in "*Effective Coaching*" ⁽¹⁾, defines coaching as "The art of facilitating the performance, learning and development of another".

Though he utilizes the word "coaching" throughout his book, the definition indicated above is the simplest that I encountered and captures well what I believe to be the purpose of mentoring. To Downey's definition, however, I would add the following words: "... towards specific career goals".

Another very good definition is given by Caldwell and Carter in "*The Return of the Mentor*" ⁽²⁾: "Mentoring is a complex, interactive process occurring between individuals of differing levels of experience and expertise which incorporates interpersonal or psychosocial development,

career and/or development, and socialization functions into the relationship. This one-to-one relationship is itself developmental and passes through a series of stages, which help to determine both the conditions affecting and the outcomes of the process. To the extent that the parameters of mutuality and compatibility exist in the relationship, the potential outcomes of respect, professionalism, collegiality, and role fulfilment will result. Further, the mentoring process occurs in a dynamic relationship within a given milieu”.

Though lengthy and a little convoluted, this definition of mentoring highlights all of the nuances intrinsic to a mentor-mentee relationship.

A third definition is provided in “*Mentoring*”⁽³⁾ by Gordon F. Shea “Mentoring can be defined as: a significant, long-term, beneficial effect on the life of another person, generally as a result of personal one-on-one contact. A mentor is one who offers knowledge, insight, perspective, or wisdom that is especially useful to the other person”.

Kathy Lacey in “*Making Mentoring Happen*”⁽⁴⁾ defines a mentor as “someone who offers emotional and psychological support, direct assistance and professional development, and career modelling. A mentor oversees the career development of another person through teaching, counselling, providing support, protecting, promoting and sponsoring”.

All of the above definitions have one thing in common. They are meant to describe mentoring in all of its forms, whether the mentee is an individual recently graduated from school or a seasoned professional focused on adding specific skills or skill sets to his/her career development in order to achieve targeted goals.

Though all very useful, these definitions (and others) only serve as background and general information to be adapted to fit the circumstances of this particular mentorship process.

Models

Chip R. Bell in "*Managers as Mentors*"⁽⁵⁾, divides the types of mentoring in five styles/roles.

They are:

i) **The Wizard:**

"Listen to my counsel, heed my word, and you may succeed".

According to Bell, the wizard has a guru quality; the focus is on the genius of the guru. The goal is the wizard's approval, not the protégé's subsequent performance. To the protégé, the wizard style can be pompous, egotistical, and mentor-centred. Also, according to Bell, there is probably a bit of this approach in all of us, given the right opportunity.

ii) **The Comic:**

"Keep 'em laughing and they'll go away feeling good".

The comic confuses entertainment with learning. Effective mentors know that levity and joy are important ingredients in learning. However, mentors with mostly comic skills can inadvertently shift the focus from acquiring competence to having a good time.

iii) **The Motivator:**

"You can do anything if you simply put your mind to it".

The "pump 'em and send 'em out" style confuses excitement, which quickly dissipates, with long-term motivation. Learning and performance depend on the protégé's understanding and acceptance of the why's.

iv) **The Sergeant:**

"Tell 'em what you're gonna tell 'em. Tell 'em. Then tell 'em what you told 'em."

The Sergeant style assumes that protégé's are dense and don't want to learn in the first place. Such an assumption is often self-fulfilling. This style also relies

on emotional distance, stern discipline, and commanding communication. Sergeants often get movement without motivation. Compliance is mistaken for commitment.

v) **The Partner;**

“You are responsible for your own learning. I am responsible for supporting, facilitating, and learning with you.”

As Bell clearly articulates, there is a little of all of the above in each one of us, to varying degrees. He indicates that the partner role is the one that best serves the protégé’s and the learning process. In his book, he provides advice, tools and techniques for facilitating commitment and adherence to this approach. Examples of helpful strategies include the following five axioms:

- Adults are motivated to learn as they develop needs and interests that learning will satisfy;
- Adult orientation to learning is life- or work-centred, not academic or theoretical;
- Experience is the richest resource for adult learning; he therefore suggests active participation in a planned series of experiences, the analysis of those experiences, and their applications to work situations;
- Adults have a deep need to be self-directing;
- Individual differences among adult learners increase with age and experience. Therefore, mentoring must make optimum provision for differences in style, time, place and pace of learning.

He further identifies the key qualities that are important in establishing and maintaining a good mentor-mentee partnership:

- **Balance:** a learning partnership is a balanced alliance founded in mutuality, interdependence, and respect;
- **Truth:** a learning partnership is clean, pure, characterized by the highest level of integrity and honesty;

- **Trust:** a trust-full partnership is one in which error is accepted as a necessary learning step;

- **Abundance:** Great trainers and mentors love learning and are happiest when they are around its occurrence;
- **Passion:** Passionate mentors recognize that effective learning has a vitality about it that is not logical, or rational, or orderly;
- **Courage:** Great mentors are allies of courage. They cultivate a partnership of courageousness. The preamble to learning is risk; the preamble to risk is courage.

Kathy Kran in "*Mentoring at Work*"⁽⁶⁾, defines mentor-mentee relationships as a continuum. At one end of the spectrum is the "**Information Peer**", in which individuals benefit most from exchanging information about their work and about the organization.

The second level is the "**Collegial Peer**" and it is distinguished from the "**Information Peer**" by increasingly complex and widening boundaries of interaction. In this kind of relationship, the information sharing function joins with emotional support, feedback and confirmation.

The other end of the continuum represents the "**Special Peer**". Becoming a special peer involves revealing ambivalences and dilemmas in both work and family realms. Pretence and formal roles are replaced by greater self-disclosure and self-expression. Through the widest range of career and psychosocial functions, individuals find support, confirmation, and an essential emotional connection that enables profound work on developmental tasks.

William Hendricks in "*Coaching, Mentoring and Managing*"⁽⁷⁾, describes a variety of models and conditions for successful mentor-mentee relationships. In my view, his most important advice not specifically mentioned by other authors referenced in this Fellowship proposal deals with clarifying expectations and verifying understanding (both parties) of those expectations. Hendricks, who utilizes many sports analogies, states: "Having the finest game plan for the best team does not guarantee success unless the plan is communicated and understood prior to execution".⁽⁸⁾

Benefits

Benefits of a successful mentoring relationship are numerous and accrue to the mentee, the mentor and to the organization.

Jean Lipman-Blumen in "*Connective Leadership*"⁽⁹⁾ states: "Developing successors is an important mechanism for ensuring the long-term success of the organization. The successor's success is also the mentor's achievement. The long-term health of the organization is proof of a professional altruism that nourishes individuals, organizations and communities".⁽¹⁰⁾

In "*The Return of the Mentor*", edited by Brian J Caldwell and Earl M. A. Carter, John Carruthers (in a paper entitled "The Principles and Practice of Mentoring") lists the following organizational benefits from a mentor-protégé relationship;

1. Increased productivity in both partners;
2. Better assessments gained by both partners;
3. Management and technical skills improved;
4. Latent skills discovered;
5. Leadership qualities refined;
6. Performance improvement;
7. Rusting managers challenged to grow; and,
8. Better recruitment and retention of skilled staff.

In "*Making Mentoring Happen*", Kathy Lacey presents the following of a mentoring process:

1. Benefits to mentors:
 - They experience enhanced self-esteem
 - They develop a close relationship with the mentee;
 - They fulfill some of their own developmental needs;
 - They receive public recognition and acclaim;
 - They can exert an extended influence on the mission and direction of the organization; and,
 - Professionally, mentors develop a revitalized interest in their work.

2. Benefits to Mentees:

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- Access to a mentor's network;
 - Acquiring (new) skills and knowledge;
 - Improved promotion opportunities;
 - Status; and.
 - Obtaining a role model.

3. Benefits to the Organization:

Lacey's list of benefits to the organization are so similar to the one defined by Carruthers that they will not be repeated here. In addition to the ones listed by Carruthers above, however, Lacey adds the following:

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- Improved organizational communication and understanding.

Preferred Approach

After this literature review on "Mentoring", the following conclusions are made:

- a) There is a definite need for Sandra and I to clarify each other's expectations for the mentoring process proposed for my Fellowship designations. There is a need to constantly re-evaluate them and to identify indicators that will allow us to measure success and/or the need to adjust the process.
- b) Both of us are adult learners and there is therefore a need to heed the advice of Chip Bell with regards to what maximizes the success of adult learning.
- c) Sandra and I have different backgrounds, experience and styles. We must therefore constantly remind ourselves of the qualities that each of us must demonstrate in order for this mentoring process to be successful.
- d) It is the mentor's intention to adopt the "Partner Model" identified by Chip Bell. Sandra will have the burden of responsibility for her own learning and I, as mentor, will have the burden of responsibility for supporting, facilitating and learning with her.

- e) Finally, the relationship between Sandra and I will be somewhere between the Collegial and Special Peer, as defined by Kran. Sharing of information will be complemented by emotional support, feedback, and confirmation.

When appropriate, some of the characteristics identified in the "Special Peer" description may enter into play. The appropriateness of engaging in Special Peer behaviour will be jointly determined by Sandra and I, if/when required.

III. Program Structure

The Program will extend for almost two years, from September 2001 to June 2003. Given the very close working relationship between the mentor and the mentee, informal information exchanges related to the mentorship will occur on a weekly basis. In addition, regular meetings will occur as per the schedule outlined below to formally assess progress as per the objectives, to make any adaptation to the mentorship program required and to assess lessons learned.

Both the mentor and the mentee have agreed to do everything possible to participate and contribute to a successful mentorship process.

A. Mentorship objectives

- Prepare mentee to assume role and responsibilities of President when the incumbent retires;
- Transfer knowledge about all facets of the CCHSE's vision, goals, linkages, strengths, weaknesses and potential future direction;
- Enhance the mentee's existing leadership skills
- Enable both the mentee and the mentor to enhance their knowledge relative to effective mentorship processes
- Create an opportunity for personnel relationship building

B. Resource Allocation

Over the period of the mentorship process, time and money will be invested to allow the mentee to participate in other learning opportunities that will contribute to the learning objectives.

C. Timetable

• Identification of mentee	June 2001
• Initiation of meetings <ul style="list-style-type: none">○ Establish learning plan○ Objectives○ Clarification of responsibilities, process and expectations	July 2001
• Submission of mentorship plan	July 2001
• Submission of tri-annual reports	December 2001 April 2002 July 2002 December 2002
• Submission of final report	March 2003

D. Development Plan: Mentor

Objective One

To share my relevant leadership knowledge and CCHSE experience with the mentee

Activities

- Regular formal meetings with mentee (twice per month)
- Continuous informal exchanges (dialogue) and work relationships
- Open-door policy relative to mentorship process and objectives

Objective Two

To transfer knowledge about all facets of CCHSE

Activities

- Continuous dialogue and work relationship
- Mentee's membership or CCHSE management committee

- Mentee attendance/participation on most/all key committees and linkages of the CCHSE (initially with mentor) with opportunity to dialogue pre-post meetings; one of the key linkages to be developed is with the College's Chapters
- Access to other key individuals to complement knowledge transfer process, including retiring Vice President, retiring Director of Membership and Certification and other CCHSE staff.

Objective Three

To improve my mentorship skills

Activities

- Review literature
- Consult with Canadian health science leaders known for their mentorship track record
- Identify and attend mentorship development workshops
- Learn from mentee relative to the 'what' and 'how' to transfer knowledge

Objective Four

Evaluate the mentorship process activities

Activities

- Develop criteria with help of literature review, consultations with other mentors and input of mentee
- Measure against criteria on a tri-annual basis
- Provide results of evaluation via tri-annual reports

E. Development Plan: Mentee

Background

Sandra MacDonald-Rencz is experienced in leadership roles and in health association environments. She holds the College's CHE designation. She was hired as the College's new Vice President in June 2001 and will officially start her employment at the College in early September 2001.

Sandra has agreed and welcomes the opportunity to be involved in this mentorship process in order to meet the objectives. Those are important for purposes of effective

succession planning for the College and are intended to be of value to the mentee and the mentor.

One of the key challenges faced by Sandra and the College over the life of the mentorship process will be to meet the objectives set while ensuring satisfactory performance in all aspects of the Vice President's day-to-day responsibilities. An organization chart (Appendix A) and a position description (Appendix B) are attached for information.

Objective One

To enhance her leadership skills

Activities

- Regular formal meetings with mentor (twice per month)
 - Continuous informal dialogue via work relationships
 - Accessing appropriate resources (in addition to mentor and other college staff) to reach this objective. This may include attendance at workshops and/or involvement in CSAE or equivalent
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Objective Two

To acquire knowledge about all facets of CCHSE

Activities

- Continuous dialogue and work relationship
- Mentee's membership or CCHSE management committee
- Mentee attendance/participation on most/all key committees and linkages of the CCHSE (initially with mentor) with opportunity to dialogue pre-post meetings
- Access to other key individuals to complement knowledge transfer process, including retiring Vice President, retiring Director of Membership and Certification and other CCHSE staff.

Objective Three

To enhance her mentorship skills.

Activities

- Review literature

- Consult with Canadian health science leaders known for their mentorship track record
 - Identify and attend mentorship development workshops
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- Learn from mentee relative to the 'what and 'how' to transfer knowledge

Objective Four

Enhance the likelihood that Sandra will be the best candidate as the next College President & CEO.

Activities

- Ensure Sandra's participation in all significant activities involving the officers of the board of directors
- Ensure Sandra's participation in all activities involving the entire board of directors
- Progressively increase Sandra's responsibilities to report to the board of directors (at its regular meetings) on progress related to management objectives, adherence to Executive Limitations and other reporting requirements
- Include in the mentorship process two yearly teleconferences with the officers of the board of directors to ensure an updated understanding of their expectations for selecting/confirming the next College President
- Assess Sandra's performance in (a) reporting relationship with the board of directors; and (b) in meeting the expectations identified by the officers of the board of directors
- Support Sandra's efforts to define her future leadership vision for the College
- Document Sandra's performance (re: reporting relationship and in meeting expectations) in tri-annual reports
- Modify the mentorship plan, if required, to address any areas of weakness identified jointly by the mentor and the mentee following the tri-annual assessments

Bibliography

- (1) *Effective Coaching*, Myles Downey, Orion Business Books, 1999

- (2) *The Return of the Mentor*, Brian J. Caldwell and Earl M. A. Carter (editors), Palmer Press, London, Washington, 1993
- (3) *Mentoring (Revised Edition)*, Gordon F. Shea, Crisp Learning, Menlo Park, California, 1997
- (4) *Making Mentoring Happen*, Kathy Lacey, Business & Professional Publishing Pty Limited, Warriewood, NSW, Australia, 1999
- (5) *Managers as Mentors*, Chip R. Bell, Berrett-Koehler Publishers, San Francisco, 1996
- (6) *Mentoring at Work*, Kathy E. Kran, University Press of America, Boston, 1988

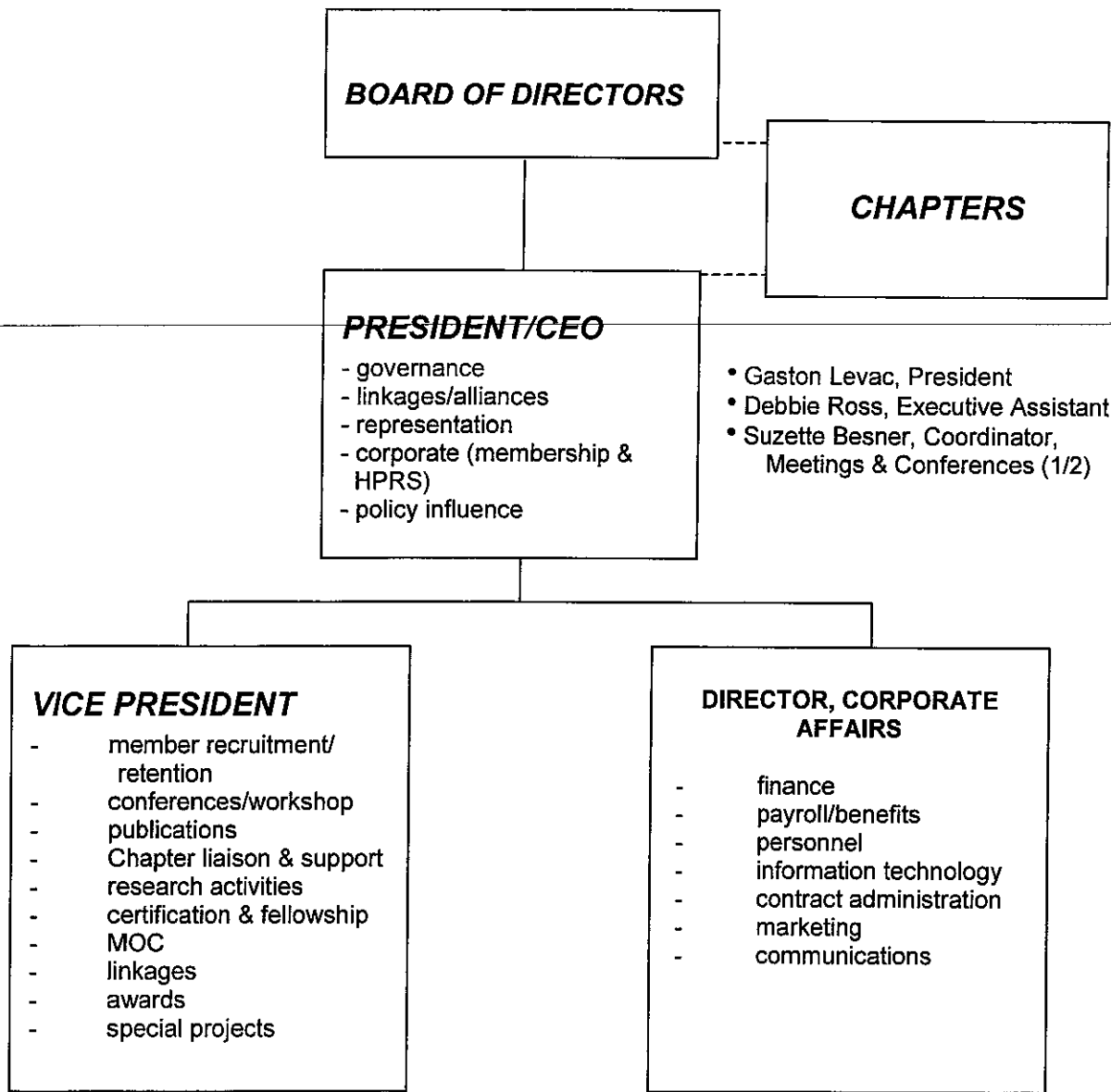
- (7&8) *Coaching, Mentoring and Managing*, William Hendricks, Career Press Franklin Lanes, NJ, 1996

- (9&10) *Connective Leadership*, Jean Lipman-Blumen, Oxford University Press, 1996



CANADIAN COLLEGE OF HEALTH SERVICE EXECUTIVES

ORGANIZATIONAL CHART



- Sandra MacDonald Rencz, Vice President
- Suzette Besner, Coordinator, Meetings & Conferences (1/2)
- Dianne Duggan, Executive Secretary (.6)
- Johanne Featherstone, Receptionist/Clerk
- Suzanne Gravelle, Administrative Assistant
- Sue Jabour, Chapter Liaison

- Carol Ann Banks, Director
- Ron Fraser, Coordinator, Information Systems
- vacant, Accounting Clerk

4 September 2001



POSITION: VICE PRESIDENT

ACCOUNTABILITY: President

APPROVED: DATE:

CORE FUNCTIONS

The position of Vice President of the College has primary responsibility for the College's major programs and services to the membership. The incumbent also serves as the Acting President of the College when the President is absent for any length of time.

RESPONSIBILITIES

1. Leads the College's membership recruitment and retention efforts. This includes the identification and implementation of appropriate strategies;
2. Assumes the lead role for the planning, development and delivery of College conferences and workshops;
3. Assumes the lead role for the production of all College publications. This includes, but is not limited to, Healthcare Management *FORUM*, the annual Health Systems Update, the regular mail-outs and all marketing materials;
4. Assumes primary responsibility for the organization of the national office's liaison with the Chapters; this may include delegation of liaison functions to other members of the team members;
5. Has primary responsibility for over-seeing the research initiatives;
6. Has primary responsibility for all activities related to the Certification and Fellowship programs, as well as the Maintenance of Certification program;
7. Has the lead responsibility for the development and administration of the Awards program;
8. Participates in the development and enhancement of the linkages with relevant stakeholders;
9. Assume the lead role in the administration of some of the special projects when appropriate;

10. Guide the work of personnel assigned to this position's areas of responsibility in an effective and collaborative manner;
 11. Assume additional responsibilities as delegated by the President.
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COMPETENCIES

1. Has completed a Master's degree in health or business administration;
 2. Has extensive experience in the Canadian health service system;
 3. Ideally has previous experience as a senior manager in an association (preferably an association in the health field);
 4. Will ideally be a Certified member of the College and/or of the Canadian Society of Association Executives; Fellowship in the College would be an added advantage. The Vice President, if not a Fellow or a CHE, will be expected to seek Certification in the College and/or the CSAE.
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5. Will ideally be bilingual.

STANDARDS OF PERFORMANCE

1. Achievement of annual objectives and activities related to the key responsibilities;
2. Meeting and exceeding performance indicators related to key responsibilities;
3. Adherence to budgets, policies and procedures related to key responsibilities;
4. Sensitivity to the needs of the health services' management profession and of the members;
5. Maintenance and continuous improvement of competencies required to successfully fulfill the expectations of the position.