

ALLIES TOOLKIT

M E N T O R I N G T E C H N O L O G Y



A Maytree idea

In partnership with The J.W. McConnell Family Foundation

A partnership of:



THE J.W. McCONNELL
FAMILY FOUNDATION
LA FONDATION DE LA
FAMILLE J.W. McCONNELL

Funded in part by:



Citizenship and
Immigration Canada

Citoyenneté et
Immigration Canada

Canada
The Government of Canada's
Foreign Credential
Recognition Program





A Maytree idea

In partnership with The J.W. McConnell Family Foundation

ALLIES (Assisting Local Leaders with Immigrant Employment Strategies) supports local efforts in Canadian cities to successfully adapt and implement programs that further the suitable employment of skilled immigrants. Through a series of multi-stakeholder initiatives, ALLIES and local partners contribute to building a stronger Canada by using the talents, connections and experience of skilled immigrants who have made Canada their new home. The project is jointly funded by Maytree and The J.W. McConnell Family Foundation.

www.alliescanada.ca

Mentoring Technology Toolkit

Contents

- I. Introduction 5
 - The Benefits of Using Technology..... 5
 - How to work with this toolkit 7
- II. Foundations for Online Transition 8
 - The Blueprint: A Service Delivery Cycle & Software Process Flow 8
 - The Service Delivery Cycle 9
 - The Subsequent Process Flow..... 16
- III. Uploading your Program: Working with a Vendor 18
 - Project Planning 18
 - Charter 18
 - Timeline..... 18
 - System Configuration..... 19
 - Look and Feel 19
 - Configuration Guide..... 19
 - Email Notifications/Text..... 29
 - Program Documents 29
 - Data Migration 30
- IV. Testing and Quality Assurance..... 31
 - Determining Roles to be Tested & Creating a Test Script..... 31
 - User Acceptance Sign-Off 33
 - Checklist 33
- V. Training 34
 - Obtaining a System Administrator Guide from Vendor..... 34
 - Developing an IT System User Guide 34
- STEP 1:..... 35
- STEP 2:..... 35
 - The Service Delivery Approach to Training..... 36

Mentoring Coordinators	36
Administrators	36
VI. Going Live!	37
Live Sign-Off	37
VII. Staying Ahead of the Curve: Software Modifications for Changing Program Needs	38
What You Can Do Yourself	38
Contact Vendor	38

I. Introduction

As mentoring programs grow across the country technology offers an opportunity to streamline programs, capture and highlight success stories, measure impact, and inform innovation in mentoring. Specifically, in the collaborative framework of mentoring for skilled immigrants, technology can play a crucial role in strengthening the community-employer-skilled immigrant network. While the goals, approaches, and formats of mentoring programs from coast-to-coast may be diverse, a benefit of technology lies in the flexibility it offers in reflecting this diversity.

This toolkit serves as a guide to mentoring technology. You will also be able to assess how technology can help your program. It will provide you with a step-by-step guide to transition your mentoring program online. Even if you do not transition online you will find processes that will be valuable to your program.

The toolkit draws on the successful deployment of mentoring technology in Toronto and Calgary. Both ALLIES cities use MentorMatch, an online mentoring technology developed by Intrafinity Inc. In 2010 MentorMatch was successfully launched in Toronto based on *The Mentoring Partnership* program. Subsequently in 2011 Calgary the technology was launched based on the *Mentoring Collaborative* program. The initial success in Toronto laid a strong foundation for deploying MentorMatch based on the service delivery cycle (SDC) and software process flow used in Toronto. While the mentoring programs share some relation, both software programs are independent of each other and are customized to meet the needs of the program in each city.

The Benefits of Using Technology

Regardless of the goal, format, or approach of the mentoring program three aspects are universal – matching, reporting, and day-to-day administration. The section below covers the benefits that technology offers in these general areas.

- A. Increased mentor/mentee match accuracy and speed with automatic **matching**
 - 1. Set the occupation and industry based criteria for your program or other defined program criteria
 - 2. Review matches recommended by the system and make a decision
 - 3. Manually match mentors and mentees
 - 4. Integrated quality assurance through recommended match decision reports

- B. Quick and easy access to various predefined statistical **reports**. These can then be used for funders, employer partners, and community partners.
 - 1. Easily measure pulse of your program through access to real-time program statistics from your dashboard

2. Access partnership check-in reports to assess mentor and mentee needs throughout a relationship
 3. Access mentee outcome reports for reporting and evaluation purposes
 4. Export reports to excel for further analysis
 5. Overall program monitoring through quality assurance reports
 6. Identify champions and success story candidates for media and promotional purposes
- C. Improve the **administration** and efficiency of your program through a systematic process flow
1. Automatic day-to-day mentoring related tasks for all participants
 2. Define and re-define your program with ease at any time
 3. Email reminders for follow-up tasks
 4. Task generated emails for instructional and informational purposes (for example, automatic “Welcome” email upon mentor/mentee registration)
 5. Individualized profiles and portals for mentors and mentees
 6. Mentors and mentees can easily update their profiles and upload resumes at any time
 7. Increased communication via online forums and targeted mass email options
 8. Ease of access to online resources through shared resource portal
 9. Integrated quality assurance via task and reporting deadlines
 10. Pause and resume partnerships as needed
 11. Online registration forms and paperless mentoring (all information stored on secure online servers)

THE LIVED EXPERIENCE # 1

Excited at the prospect of automation, one of the coordinators in Calgary remarked “it’s like having my own mentoring executive assistant”. The automated tasks and reminders found within MentorMatch made her life easier.

If these benefits can assist in broadening the reach and impact of your mentoring program, technology should be a serious consideration. However, while there are numerous benefits of using mentoring technology it must be weighed against the costs. In determining if technology is for you, there are a number of considerations to be made:

1. What stage is your program currently at?
 - i. What are the goals of your mentoring program vis-à-vis the number of mentees, mentors, and employer and community partners you hope to reach?
2. Current Costs: what are the current costs of running your program?
3. The nature of your program: is it collaborative or run centrally?

- i. Collaborative programs will require an engagement plan for service delivery partners and resources for training
 - ii. Central programs may require full time resources for each aspect of the program (Mentors and Mentees).
4. Funding: do you currently have or can you secure funding for costs of developing and maintaining the software?

How to work with this toolkit

In the pilot phase of your mentoring program or looking to get the most out of an established program?

Foundations for Online Transition may be useful in developing and strengthening various processes within your program.

Taking your program online?

In addition to *Foundations for Online Transition*, the following sections will be useful:

Uploading your Program: Working with a Vendor,

Testing and Quality Assurance

Training

Staying Ahead of the Curve: Software Modifications for Changing Program Needs

Already Online?

The following sections may be useful:

Testing and Quality Assurance

Training

Staying Ahead of the Curve: Software Modifications for Changing Program Needs

II. Foundations for Online Transition

The challenge with taking your program digital is that it exists and must continue to run while you are in the transition process. At the same time, there is an opportunity in this challenge as this process will allow you to recapture all aspects of your program and use the lived experience to improve upon it. As with any project, the foundation is the most important aspect. Transitioning your program online is no different. Think of this project as building a house from the ground up. There are various elements in the foundation which will come together to ensure a strong and flexible structure.

The Blueprint: A Service Delivery Cycle & Software Process Flow

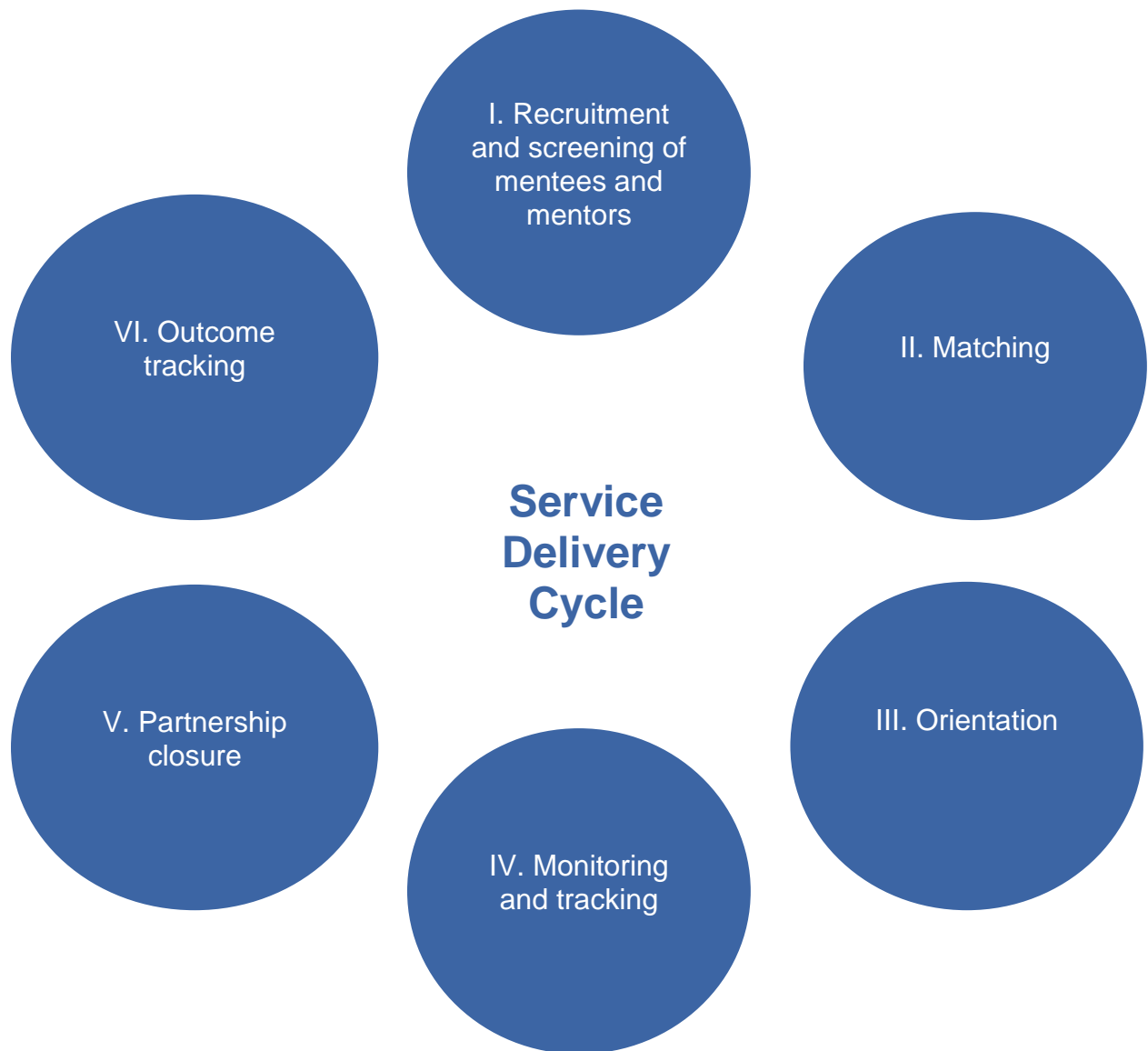
Before you can build your foundation however, you will need a blueprint. The blueprint for your program's new home is a clear process flow. If your program has a process flow in place, it may need to be reformatted to fit the new reality of the online environment. If no program process flow exists, one needs to be created (for more information on building mentoring programs, please refer to the [ALLIES Mentoring Toolkit](#)). The process flow is based on a service delivery cycle (SDC). The SDC is a general overview, whereas the software process flow is quite specific. The process flow serves as the essential plan of your program. Each phase of your program must be delineated along with roles and responsibilities. No question or consideration is minor. It is also important to be as detailed as possible. In clarifying these details, you are effectively putting your **business requirements** on paper. Thus, when the software developer asks, "What do you want the software to do?" you will have an answer in your blueprint.

Here some possible questions to ask for each phase of your program:

- What must happen during this phase of the program?
- Who is involved in this phase of the program and what is their role?
- How will this phase play out? How will participants achieve their objectives in this phase?
- What deadlines are involved in this phase?
- Are there any reminders to the participants of these deadlines? What form will this take?
- What information is relayed to participants regarding their objectives?
- When is this phase of the program complete? What must happen for this to occur?
- When does the next phase begin? What is the trigger?

The following six phases are part of a SDC used in Toronto and later modified in Calgary. The SDC captures the generic lifecycle of a mentoring relationship. Each heading corresponds to a phase of the mentoring program. Within each phase, there are questions that will guide the software definition. Accordingly, it is the answers to these questions that will build the software process flow. Consider each question and the consequences of the answer. The goal here is to ensure your program is as responsive to real life situations online as it is currently, while maintaining program integrity and quality assurance.

The Service Delivery Cycle



Phase I: Outreach & Recruitment

Once built, the outreach and recruitment phase of your program will correspond to your virtual office foyer. This is where people will arrive either knowing why they are there or simply browsing. You will need a reception area that will provide the visitor with information about the program and evaluate whether they are a potential mentor or mentee candidate. If they are potential candidate they must have an easy way of proceeding with an application, if they are not, they can be provided with information on how to become an ideal candidate.

Questions to consider during this phase:

Who are the ideal mentor and mentee candidates for your program?

How do the mentor candidates become part of the program?

How do the mentee candidates become part of the program?

What information will be collected from the mentor candidates?*

What information will be collected from the mentee candidates?*

Will references be required for the mentor? The mentee? If so, how will they be checked?

Are documents collected from the mentor or mentee?

Is there a screening process?

1. How is this conducted? (Interview? Survey? Resume screening?)
2. What happens to rejected applicants?

Who will coordinate recruitment and screening? An Individual(s)? An Agency(ies)? An Immigrant Employment Council?

At the end of the outreach and recruitment phase, the most important question is: ***what is the status of the mentor or mentee?*** There are three possible answers to this question:

- a. the mentor or mentee is an ideal candidate and will continue to the next phase
- b. the mentor or mentee is not an ideal candidate but has the potential to become one with more experience or upgraded credentials; they will continue to the next phase of the program once they have the experience and/or the upgraded credentials
- c. the mentor or mentee is not an ideal candidate and will not continue in the next phase of the program

The answer to the question above will trigger the next phase of your program.

**Note: collecting and storing information online requires that you inform users of your software how that information will be used and gain their express consent to collect and use this information. It is a good idea to draft a privacy policy as you are developing business requirements.*

Sample Privacy Statement

Consent to disclosure and use of personal information

The Mentoring Collaborative is a program of the Calgary Region Immigrant Employment Council (CRIEC) and is delivered in partnership with CRIEC's community partners.

The personal information collected by the Mentoring Collaborative is for the purposes of effective program delivery and will not be shared for any other purpose. More specifically, information is collected for: determining program eligibility; matching mentors and mentees; statistical reporting; outcomes follow up and evaluation; reporting to program funders. Information may be shared with community partners, government funding partners, or employer partners to ensure effective program delivery.

CRIEC and its community partners are committed to protecting the privacy of your personal information. All information provided will be held in confidence and will be protected in a manner that satisfies the requirements of applicable legislation. CRIEC and its community partners will take all measures reasonably necessary for the protection of your personal information against unauthorized release or disclosure. Your information will be shared only for the purposes listed in the paragraph above.

Phase II: Matching

Matching is one of the most important aspects of any mentoring program. For the program to be a success the match must be accurate and made in a timely manner. Intrafinity will work with you to automate the matching process for your program. However, matching is more than just establishing a set of criteria to bring the mentor and mentee together. Matching is an active process that has the goal client – mentors and mentees – satisfaction and will yield the best results. More details on matching in section III, consider the following for now.

Questions to consider during this phase:

What must happen before a mentor and mentee are matched?

How are mentors and mentees matched in your program? What are the criteria? What is a perfect match? What is a bad match?

Who will make decision on these matches?

Will you have supplementary guidelines (i.e. considerations for location) for match decision-makers?

- i. What questions will be on this checklist?
- ii. When will it appear before a decision-maker?

In the National Mentoring Initiative the main matching criterion is occupation. MentorMatch is configured to match on the National Occupational Classification (NOC) and the North American Industry Classification System (NAICS) codes. In MentorMatch, this comes at an additional cost.

THE LIVED EXPERIENCE # 2

In order to improve the quality of the matches, the ALLIES cities that currently use MentorMatch found it necessary to favour the occupation more the industry. This would reduce the chances of people who worked in the same industry with varying occupations being matched. The change was easy to make and had a direct impact on the quality of matches!

The occupation is based on the National Occupational Classification (NOC) and the industry on the North American Industry Classification System (NAICS) codes.

Phase III: Training/Orientation

MentorMatch will integrate each part of your program into a seamless process. If you do not have a Training/Orientation session as part of your program, it may be a good time to consider one. If such an aspect of your program already exists, how can it be made more efficient?

Questions to consider during this phase:

Is there an orientation session?

- i. Is it conducted in a group or by pair?
- ii. Are there any surveys? (Pre/Post or both?)
- iii. Who will conduct the Orientation Session?
- iv. What resources will be used at the Session? (Handouts, Factsheets, Partnership Guide/Handbook)
- v. How are invitations sent out for the Orientation Session?

Phase IV: The Partnership

There is no doubt that the partnership is the most important aspect of the mentoring program. Here is where all aspects of the program will intersect. The mentoring coordinator/coach, the mentor/mentee, and the manager will be involved in the partnership. The mentoring coordinator/coach will play a large

part in ensuring the partnership goes as planned and the clients – the mentor/mentee –have the resources they need to succeed.

Questions to consider during this phase:

How long is the partnership?

Are there regular check-ins conducted with the mentor and the mentee?

i. What questions are asked of the mentor? Of the mentee?

Who will record the progress?

Are there any resources to help the mentor/mentee during their journey?

Are there any surveys in the middle of the partnership?

Sample Check-In Report

Month 1 Check-in Report	
Month 1 Check-in Report	
Mentor:	
Action taken:	Please Select
If unable to contact mentor, please provide details:	<ul style="list-style-type: none"> Please Select Called mentor Emailed mentor Met with mentor in person Unable to contact mentor Did not contact mentor
Mentor check-in notes:	
How many times have you met?	
What topics related to your profession have you discussed/expored?	
What are some of the challenges you are facing?	
What are the successes/areas of growth and development?	

Phase V: The End of the Partnership

This phase deals mostly with the act of closing the partnership. In other words, this is the trigger of the post partnership process. In addition, other instances where a partnership must be closed should also be considered here. For instance, does a mentee obtaining employment in their area of expertise during the third week of their partnership constitute a closed partnership? These are details that will have to be ironed out at the program level and then implemented on the software.

Questions to consider during this phase:

- How is the partnership brought to an end?
- Who will close the partnership?
- What are the criteria for a closed partnership?
- What other scenarios constitute a closed partnership?

Phase VI: What happens after the partnership?

Just as there was a clear process for establishing a match, there must be a clear process for ending a match. Of course, the completion of the partnership is only the end for the clients, for the community partners and immigrant employment agencies, it merely signifies the beginning. This is so for one major reason: results. The results range from professional development for mentors to securing employment for skilled immigrants. Therefore, how these results are tracked becomes extremely important. The successes of these relationships and the success of the various partners in their documentation have a direct impact on the funding and sustainability of these programs.

Questions to consider during this phase:

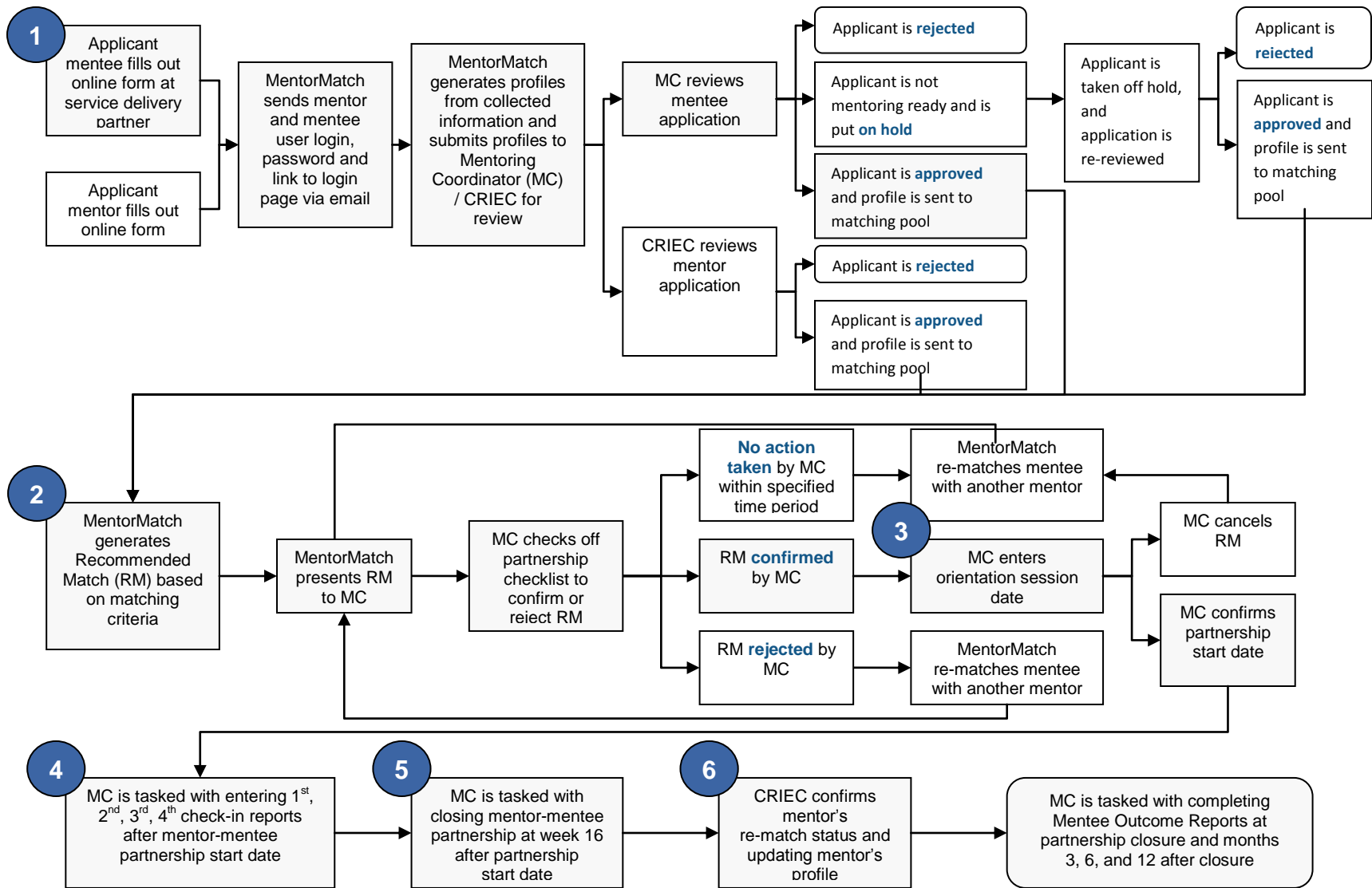
- How are results/outcomes monitored?
 - i. What questions will be asked of the mentor/mentee?
 - ii. Who will conduct the tracking of outcomes?
 - iii. At what intervals?

How will professional development needs be assessed for the mentor? How will they be delivered and is there a role for the software in delivery?

The Subsequent Process Flow

Once you consider all the questions for each phase of your program, you can create a software process flow from your answers. Below is an example of a possible result of the exercise above. Each number corresponds to a phase in the Service Delivery

Cycle.



III. Uploading your Program: Working with a Vendor

With your blueprint complete, you are ready to contact a vendor. Choose the vendor that offers the best product and customer service. This will be a long process. As such it is important to choose a vendor that will be responsive, deliver a good product, and do it on time. Both Calgary and Toronto used the same vendor due to their experience with mentoring software. The rest of this section will provide details on how to work with the vendor to realize your mentoring program online.

Project Planning

The first step in working with your vendor is project planning. This is a collaborative process and may take a few meetings with the vendor to complete. During this stage, you will establish the processes and timelines that will govern the project.

Charter

The project charter is a formal agreement between your organization and the vendor. The charter will cover areas such as project scope, roles and responsibilities of individuals involved, communications, issue management, and the procedure for making changes to the initial project scope. Once you develop the Project Charter with your vendor and are satisfied with it, ensure that both you and the vendor agree and sign to it. This will be the document you will refer to throughout the project. You may find that you will need to change this document from time to time. If this is the case, keep a copy of the old document as well as the new one.

Timeline

In addition to the Project Charter, a Project Timeline developed with the vendor is also an important tool to keep the project running. The vendor will propose a timeline for the software development from requirement gathering to production. The timeline proposed will be an estimate of the amount of work necessary to complete the project. If there is something that is unclear, ask for clarification. Establishing a timeline is a delicate process that should take into consideration resources, other calendar commitments both for you and the vendor, as well as balancing enough buffer time with reasonable completion date. Based on the experiences in Calgary and Toronto, a rough estimate of project completion is roughly 4 – 5 months.

At the end of the planning process you should feel confident about the project and the milestones that you have set.

System Configuration

This stage of the project will see the blueprint that you prepared translated into what are known as business requirements. Essentially, your program is written out section by section in language that both you and the vendor will understand. This process will continue to be a collaborative one where the vendor will ask you for specific information. You may receive forms to fill in and submit to the vendor. Before completing any form, however, it is good practice to read through it and ensure that each area is clear. A simple misunderstanding during the requirements gathering process may lead to a technical blunder in later stages of development or wasted time (as you will have to redo things).

It may take a few iterations of each aspect of the configuration between you and the vendor as questions arise and clarifications are made. In order to reduce confusion, agree on a naming convention for files and include a date in each filename. Also keep a *Draft* and a *Final* folder to store the respective versions – this will allow you to track the differences in each version of the documents and their implementation.

Look and Feel

This section is exactly what it reads – how do you want the software to look? What is the aesthetic feeling of the software? In most cases it will be a matter of matching the software to your branding. If you already have a website, it is best practice to have the software follow the feel of the website to ensure a seamless connection between the two as MentorMatch is an online tool.

Configuration Guide

Next, you will complete what will be the nuts and bolts of your program. The **Configuration Guide** is a delineation of your business requirements. Here your blueprint takes a format that is easy for software developers to work from. It is organized into different aspects of the software program.

Mentoring Program Information

The first step in completing the Configuration Guide is to refer to the structure of your program. Is your program collaborative in nature or is it delivered centrally? Are your mentors recruited at the corporate level or at an individual level? The answer to these questions will determine the digital structure of your program. If the program is collaborative in nature, you must include the partner organizations that deliver the program. This will include corporate/employer partners and community partners/agencies. Each agency that participates in the delivery of the program will be known as a “program” whereas each employer partner will be referred to as a “corporate partner”. Please see below for an example of how to enter these details.

Mentoring Program Information (Mentors)	
Corporate Partner Name	TD Canada Trust
Corporate Partner Description	Banking and Financial Services
Corporate Partner Key Contact	George Raymond

Mentoring Program Information (Mentee)	
Community Partner Name	The United Way
Community Partner Description	Social Services and Community Building
Community Partner Key Contact	Amy Singh

Repeat each for as many partners as there are in your program.

User Profile Information

The registration form, profile information, and general privacy settings are determined by filling out a User Profile Information sheet.

When drafting your registration form, consider what information you want to collect, what form it will take, if it is mandatory, and whether or not you want to report on this in the future. If you want to report on a question in the future it is important the question be mandatory and be collected in a manner that will generate useful reports. In other words, a standardized method to capture the information you are looking for might be necessary (a drop down list for instance). See below for an example of how you can collect this information.

User Profile Information (Mentor)			
<u>Field Name</u>	<u>Field Type</u>	<u>Mandatory</u>	<u>Field Selections</u>
Your question or information you want to know.	How do you want to collect this information (format)? <ul style="list-style-type: none"> - Time of Day - Date - Date and Time - Drop Down List - Multiple Selection Box - Plain Text Box - Text Field - NAICS/NOC - Phone Number 	If you want to report on it or if it is necessary for the match, it should be mandatory.	Enter the selections that would appear in the Drop Down List or the Multiple Selection Box . You may leave this field empty if you have selected a field type not mentioned above (a text field for instance).
Daytime telephone	Phone Number	Yes	N/A

number:			
Languages Spoken:	Multiple Selection Box	Yes	Arabic, Berber, Cachi, Dutch, English, Other...
Other Languages	Text Field	No	N/A
Present Employer	Drop Down List	Yes	TD Canada Trust, Air Canada, KPMG, Other...
If <i>Other</i> please specify	Text Field	Yes	N/A
How many years have you worked in your profession?	Drop-down List	Yes	Please Select 5-10 years 11-15 years 15+ years

User Profile Information (Mentee)

<u>Field Name</u>	<u>Field Type</u>	<u>Mandatory</u>	<u>Field Selections</u>
Your question or information you want to know.	How do you want to collect this information (format)? - Time of Day - Date - Date and Time - Drop Down List - Multiple Selection Box - Plain Text Box - Text Field - NAICS/NOC - Phone Number	If you want to report on it or if it is necessary for the match, it should be mandatory.	Enter the selections that would appear in the Drop Down List or the Multiple Selection Box . You may leave this field empty if you have selected a field type not mentioned above.
Daytime telephone number:	Phone Number	Yes	N/A
Languages Spoken:	Multiple Selection Box	Yes	Arabic, Berber, Cachi, Dutch, English, Filipino, French, German...
Other Languages	Text Field	No	N/A
Are you currently unemployed or underemployed (i.e. not working in your field of expertise)?	Drop-down List	Yes	Please Select No Yes
Have you attended a job search workshop and if so, when and where?	Text field	Yes	N/A
How many years of experience do you	Drop-down List	Yes	Please Select 3-5 years

have in your profession?		6-10 years 11+ years
---------------------------------	--	-------------------------

Privacy Settings

The collection and storage of information requires that you set each individual’s level of access, viewing privileges and protect their profile information. In order to do this you must fill out another section of the configuration guide that deals with privacy. Please see below for an example of this:

Privacy (Mentee)				
Field Name	Public User View Visibility	Search Criteria Visibility	User View Visibility	User Profile Visibility
	Select whether the information is visible to the mentor or not -Visible -Not Visible	Select the roles (from the list below) that are capable of searching for this Field -Administrator -Mentoring Coordinator -Mentor -Mentee	Select the roles (from the list below) that are capable of viewing this Field within their profile page -Administrator -Mentoring Coordinator -Mentor -Mentee	Select the roles (from the list below) that are capable of viewing and/or editing this Field within a user's profile page -Administrator -Mentoring Coordinator -Mentor -Mentee
	Applicable Roles	Applicable Roles	Applicable Roles	Applicable Roles
Languages Spoken:	Visible	Administrator/ Mentoring Coordinator	Administrator/Mentoring Coordinator/Mentor/Mentee	Administrator/Mentee
Other Languages	Visible	Administrator/ Mentoring Coordinator	Administrator/Mentoring Coordinator/Mentor/Mentee	Administrator/Mentee
Are you currently unemployed or underemployed (i.e. not	Not Visible	Administrator/ Mentoring Coordinator	Administrator/Mentoring Coordinator/Mentor/Mentee	Administrator/Mentee

working in your field of expertise)?				
Have you attended a job search workshop and if so, when and where?	Not Visible	Administrator/ Mentoring Coordinator	Administrator/Mentoring Coordinator/Mentor/Mentee	Administrator/Mentee
How many years of experience do you have in your profession?	Visible	Administrator/ Mentoring Coordinator	Administrator/Mentoring Coordinator/Mentor/Mentee	Administrator/Mentee

Eligibility Rules

The configuration guide is also where you will set your eligibility rules. Here you can state what the number of years of experience a mentor needs to be in your program or how long a mentee needs to have been in the country. Please see the example below:

Field Name	Matching Statement Enter the matching logic used to match between a Mentor and Mentee. - Equals - Not Equals - Less Than - No Less Than - More Than - No More Than	Applies To (Mentor / Mentee)
Field Name	Eligibility Rules	Applies To
Possess a professional network (people you know in your profession - i.e. colleagues)	Equals: Yes	Mentor
Belong to a professional association (where applicable)	Equals: Yes	Mentor

Able to set time aside to develop a supportive professional relationship (24 hours over four months)	Equals: Yes	Mentor
<i>Ready for employment in area of expertise</i>	<i>Equals: Yes</i>	<i>Mentee</i>
Recent years of experience (in or outside Canada) in area of expertise	Years of recent experience = > 3	Mentee
Be unemployed or underemployed	Equals: Yes	Mentee
Possess the English skills necessary to perform their work (reading, writing, listening, speaking)	Canadian Language Benchmark (reading) = > 7 Canadian Language Benchmark (writing) = > 7 Canadian Language Benchmark (listening) = > 7 Canadian Language Benchmark (speaking) = > 7	Mentee
Able to set time aside to develop a professional relationship (24 hours over four months)	Equals: Yes	Mentee

Matching Algorithm

Mentor-mentee matches are automatically generated by MentorMatch.

In Toronto and Calgary, matching is based on two factors: occupation and industry. The occupation is based on the National Occupational Classification (NOC) and the industry on the North American Industry Classification System (NAICS) codes. An algorithm in MentorMatch compares the NOC and NAICS codes of all available mentors and mentees in the system. Each mentor and mentee is assigned a Primary and Secondary NOC and NAICS Code. The closer the mentor and mentee NOC and NAICS are to each other the higher the numeric value of the match and the more precise the match. The matching algorithm will be defined by you and can be modified and edited by the system administrator at any time. The initial set of criteria must be made clear in the in the configuration guide.

Here is a sample of a matching algorithm. MentorMatch will try and match the primary codes first. If no match is found, it will proceed to matching the secondary codes. Notice how the quality of the match diminishes as the sequence progresses from matching the primary codes to matching the secondary codes.

<u>Matching Sequence</u> The process used by the software to match codes	<u>Match Weighting</u> Score out of 100
Primary Mentee NOC Code to Primary Mentor NOC Code	0.75
Primary Mentee NAICS Code to Primary Mentor NAICS Code	0.25
Secondary Mentee NOC Code to Primary Mentor NOC Code	0.74
Secondary Mentee NAICS Code to Primary Mentor NAICS Code	0.24
Primary Mentee NOC Code to Secondary Mentor NOC Code	0.73
Primary Mentee NAICS Code to Secondary Mentor NAICS Code	0.23
Secondary Mentee NOC Code to Secondary Mentor NOC Code	0.72
Secondary Mentee NAICS Code to Secondary Mentor NAICS Code	0.22

<u>Occupation/Industry</u>	<u>Match Weighting</u>		
Occupation (four digits considered)	Digit Score	Total match weighting	Total score of digit match:
Match at 1st digit	0.25	x 0.75	= 18.8%
Match at 2nd digit	0.30	x 0.75	= 22.5%
Match at 3rd digit	0.85	x 0.75	= 63.8%
Match at 4th digit	1.00	x 0.75	= 75.0%
Industry (three of four digits considered)			
Match at 1st digit	0.30	x 0.25	= 7.5%
Match at 2nd digit	0.55	x 0.25	= 13.8%
Match at 3rd digit	1.00	x 0.25	= 25.0%

As you can see, the NOC and NAICS comparison is weighted to give greater emphasis to the closeness of the occupational match and less emphasis to the closeness of the industry match.

In Calgary and Toronto, a minimum score has been established for an acceptable match. When the NOC and NAICS percentages are combined, the total weighted score must meet a minimum score in order for a match to be recommended to the mentoring coordinator. The system will always begin by sending the highest matching score first.

In the event that more than one best match is generated there is a tie-breaker process within MentorMatch. Currently in both the ALLIES cities using MentorMatch, when two or more recommended matches have the same final score, the recommended match will be sent first to the mentoring coordinator with the least number of completed partnerships.

Some important questions to consider if you are adopting an industry and occupation based matching algorithm:

1. What will the weighting of the NOC code be?
2. What will the weighting of the NAICS code be?
3. Which of the two will be given greater emphasis?
4. How will you weigh the digits of each code to fit your program needs?
5. Will you have a minimum score for matches that the system recommends?
6. What is the tie-breaker process if more than one best match is generated?

Surveys

After you have determined how many surveys you will have in your program and at what points, write out the questions and include them in your configuration guide. Also include any notification emails that will go along with your survey.

Survey settings		
Role to be Surveyed	At what stage?	Email notifications and other details:
Mentor	End of Partnership	Notification and Task on Dashboard
Question	Type of answer	Multiple Select or Drop-Down Options
1) The program's goals and objectives were clearly defined.	Multiple choice	Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree
2) The orientation session was useful and met my needs.	Multiple choice	Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree
3) Additional comments	Short Answer	Text Field
3) The Mentor Handbook was useful and met my needs.	Multiple Choice	Yes/No
4) What other information would be useful to include in the Mentor Handbook?	Short Answer	Text Field

Email Notifications/Text

An important feature of MentorMatch is the automated email notifications. The software has the capacity to send out emails at various points within the program. These emails are either informational (*Welcome to the Program*) or instructional (*Please Complete this Survey*). For mentoring coordinators and administrators, there are also task associated emails (*Please Update The Mentor's Availability Status*). Determine at which points in your program you will require emails to be sent out and provide the vendor with the text of the email. Below is an informational email notification:

Subject: Welcome to The Mentoring Collaborative | Your application is being reviewed

Dear applicant,

Thank you for applying to be a mentee with CRIEC's Mentoring Collaborative.

A mentoring coordinator from one of CRIEC's community partners will review your application and let you know if you are eligible for the program. If you meet the eligibility requirements, they will contact you to set up a meeting interview and take you through the full registration process. If you are accepted into the program, you will receive an email confirming your participation.

In the meantime, you can access your Mentoring Dashboard at www.criec.ca/#MyMentoringDashboard with your username and password (sent to you in a previous email with the subject: Welcome to The Mentoring Collaborative).

You can manage your mentoring profile and update your contact or employment information provided in your application. To access the Mentee Handbook go to: www.criec.ca.

Thank you.

CRIEC Coordinator



Program Documents

Another advantage of mentoring technology is the ability to store all your program documents online. This also allows you to have a portal where users can access documents such as a *Mentee Handbook* or an *Initial Screening Questionnaire* for mentoring coordinators. In order to ensure that your software product is up-to-date on completion, take stock of all program documents and resources and compile

them in folders with the appropriate permission level needed to access them. In other words, store all files that a mentee might need in one folder, all files a mentor might need in another, and likewise for mentoring coordinators and administrators. Note: the best format for files to be uploaded is pdf.

Data Migration

Inevitably, there will be data that you want to migrate into the system once it goes live. The act of moving the data is called data migration. Your data must be cleaned and packaged in a way that will be easy to move to the new environment. This is a process that will take some time. Ensure that you have the data you want to migrate ready and preferably in an excel sheet. This data will include information such as the mentors, mentees, and partnerships that currently exist as your program is running. To ensure consistency in the data it is best that one person be responsible for the preparation of the data. Once you submit your data, the vendor might determine that certain characters must be removed to ensure there is no interference with the migration algorithm (the language that migrates the data). By establishing the standard for this data early, you are aware of how to organize your data as new mentors, mentees, and partnerships join your program.

IV. Testing and Quality Assurance

The testing period begins once the vendor has succeeded in translating your business requirements (**Configuration Guide**) into a software program. This is your opportunity to log on to the software and test all aspects to ensure that the vendor has created a product that reflects your business requirements. This process will take some time and will be a back-and-forth between you and the vendor.

Determining Roles to be Tested & Creating a Test Script

The first step during the test period will be determining what roles need to be tested and what parts within the program. Below is an example of a process and its related tasks:

1. Registration process
 - a. Mentor
 - i. Username and Password Received?
 - ii. Welcome email received?
 - iii. Access to mentoring dashboard?
 - b. Mentee
 - i. Username and Password Received?
 - ii. Welcome email received?
 - iii. Access to mentoring dashboard?
 - c. Mentoring Coordinator
 - i. Follow up task to review **mentee** application appears on dashboard?
 - ii. Email reminder of task received?
 - iii. Completion of approval task, triggers next task in the process (Enter Orientation Date)?
 - iv. Completion of Orientation Date task triggers next task in the process (Confirm start of partnership)?
 - d. Administrator
 - i. Follow up task to review **mentor** application appears on dashboard?
 - ii. Email reminder of task received?

The example above is drawn from a workflow created from your software process flow. In translating your business requirements, the vendor will create various workflows for segments of your program. Become familiar with these workflows and ask the vendor for help if something is not clear. Once you have a grasp of the workflows it is easier to create test scripts and know what you are looking for in test results.

The workflow testing is only one part of the overall testing. Other aspects that will need testing include Reporting, Administrator Profile testing, and Mentoring Coordinator/Coach profile testing.

The vendor will provide you with a test environment where you can log on, learn how to use the software and test it.

Sample Test Script

The [Mentee](#) has a **Recommended Match**; the [Service Delivery Partner Coach](#) reviews the [Mentee](#) and [Mentor](#) profiles and the match score breakdown to determine match suitability.

UC-11 Main Test Case	Procedure/Inputs	Expected Results	Pass/Fail
1. The Service Delivery Partner Coach reviews the Mentee's Recommended Match	Select " Recommended Matches " from View Recommended Matches	Recommended Matches list appears on screen	Pass
2. The Service Delivery Partner Coach reviews the Mentee and Mentor profiles and match score	1. To review the Mentee 's profile, select the Mentee name (select the "Back" bottom to go back to Recommended Matches list)	Mentee profile appears on screen	Pass
	2. To review the Mentor 's profile, select the Mentor name (select the "Back" bottom to go back to Recommended Matches list)	Mentor profile appears on screen	Pass
	To review the match score breakdown, mouse over the score percentage	Match Score breakdown appears on mouse over	Pass

Comments/Suggestions/Feedback

Upon completion of your tests submit your documented results to the vendor. The vendor will then test and correct any bugs. Once they have rectified the issues within the software, they will notify you and it will be time to retest the software to ensure that everything is working well. Document this phase as well.

User Acceptance Sign-Off

User Acceptance Sign-Off signifies the end of the testing period. The vendor will provide you with a sign off sheet that will formalize the end of the testing period and have you sign that everything is okay with the software. Once signed, any changes that you would like to make will be charged at additional cost so it is important to be extremely thorough before signing. Below is a check-list before signing the User Acceptance Form.

Checklist

- Un-matched Mentor/Mentee Profile and Access
- Matched Mentor/Mentee Profile and Access
- Mentoring Coordinator Profile
- Administrator Profile
- Emails sent at the correct times
- Tasks appear for Mentoring Coordinators & Administrators as they should
- Reports function as they should
- Surveys – email notifications functional, survey sound, and reports accessible
- Registration process flawless
- General notes on bugs; questions; comments and feedback addressed by vendor

V. Training

Once the development and test phase of your software program is complete, you will have to prepare a training program. The best approach to the technical training is a two-stage approach – program training followed by technical training. Experience has shown that for the technical training to be effective, all users of the software must have a comprehensive understanding of the program.

THE LIVED EXPERIENCE # 3

During a technical training conducted in Calgary, one of the mentoring coordinators made the connection between the program and software remarking “it’s very intuitive, because I already know what the next step is.”

At the same time, a coordinator that had not attended program training had challenges during the technical training as they lacked the program context. Most questions asked by this user had to do with program processes rather than technical process.

For steps on how to build a training program, refer to the section below.

Obtaining a System Administrator Guide from Vendor

The vendor is responsible for providing you with a manual or a system guide for the software. In the case of Intrafinity, a generic user manual was provided. This user manual covered the entire software and the suite of capabilities available. Although this might be overwhelming at first, it is important to be aware of all the capabilities of the software. This will lessen the reliance on the vendor for simple changes to the software and will prepare you for the training. Once you have the Administrator System Guide, familiarize yourself with the aspects that will come up most often and read through sections that will be beneficial for later.

Developing an IT System User Guide

When you are comfortable running all mentoring related tasks on the software, develop a user guide for mentoring coordinators/coaches. This will serve as a manual during the training and will be a useful reference once the training is complete. The IT System User Guide should be customized to include all the tasks and notifications that will be part of the software. When preparing the guide for mentoring coordinators, include instructions as well as screenshots.

1.1 Reviewing an Application

After an applicant is registered in the system, the mentoring coordinator must review the profile. If the applicant meets the **Suitability Guidelines and Mentoring Readiness Checklist** criteria, the mentoring coordinator approves the profile. The profile is assigned a Mentee status in the program and added to the matching pool. If the applicant is not mentoring-ready, and would like to complete training to become mentoring-ready, the profile is put on hold. If the applicant is not suitable for the program, the application is rejected.

STEP 1:

- On the dashboard, select **Review Application** task from **My Latest Tasks**, for the specific applicant.
- Click on the **name of the applicant** under **Related To**.
- The applicant's profile will open in a new window.

STEP 2:

- Under **User View** tab, review the applicant's information to ensure it is correct. *Special attention should be paid to reviewing the NOC and NAIC codes. Please refer to the Appendix for detailed instructions on choosing codes.*
- Click on the **Edit Profile** tab. Enter the mentee's occupation and industry codes. Fill in any missing information, and complete the **Suitability Guidelines and Mentoring Readiness Checklist** at the bottom of the page. Click **Update** at the bottom of the page.
- Click on the **Resume** tab. Ensure the applicant's resume is uploaded. (see Uploading a Mentee's Resume section 1.3)
- Close the applicant's profile.
- The **Review Application** page remains open.

Review Application
Please complete the following steps:

1. Review the applicant's information.
 - Under **Related To** select the **applicant's name**. (The profile will open in a new window)
2. Enter the applicant's occupation and industry codes.
 - At the profile page, click the **Edit Profile** tab, enter the occupation and industry codes.
3. Interview the applicant and complete the Suitability Guidelines and Mentoring Readiness Checklist in the application.
 - Scroll down to the Suitability Guidelines and Mentoring Readiness Checklist, select all criteria that apply to the applicant.
 - Click **Update** at the bottom of the page.
4. Ensure that the applicant's resume is uploaded.
 - Click the **Resume** tab, check to see the applicant's resume is uploaded. If the resume is not uploaded, upload the resume.
5. Make your decision to approve, hold or reject the applicant.
 - To approve the applicant, select **Approve applicant** in the Make your decision box.

The Service Delivery Approach to Training

The service delivery cycle (SDC) and the software process flow serve as great templates for your software training. The SDC is the systematic backbone of your program, as such it will be easy to follow and the tasks found within each section will be familiar and predictable. Two major roles must be considered for training – the mentoring coordinators/coaches and the administrator.

Mentoring Coordinators

Since mentoring coordinators/coaches are responsible for delivering the bulk of the program, it is important that their training give them a strong foundation to tackle the day-to-day tasks on MentorMatch. Using the SDC as general guide ensures that you cover the program in its entirety. Each section of the SDC should be linked with the correlating MentorMatch tasks and responsibilities for the mentoring coordinators/coaches.

In addition to a SDC based training, a basic “How to” training that will orient the users on the MentorMatch software should be conducted as an introduction. This portion of the training will be hands on training where the mentoring coordinators/coaches can see and click on various links to become familiar with their new “executive assistant”. In fact, if at all possible, all training should be as hands. The vendor should provide you with a test environment where mentoring coordinators/coaches can practice.

Administrators

In addition to understanding the role of the mentoring coordinator/coach, the administrator will have to have a higher level understanding of the entire program and how it relates to the software. The administrator will also need to understand how to build a “program” on MentorMatch and how to take it down once it is no longer active. The System Administrator Guide is required reading for anyone that will be an administrator of MentorMatch.

However, since not all members of the team can be experts on MentorMatch, it is important that the administrative team at least have an understanding of what the most common tasks are and how to complete them. Below is a list of common MentorMatch tasks for administrators:

1. Approving Mentor Applicants
2. Manual Matches
3. Adding a Mentoring Coordinator/Coach
4. Adding & Removing Employer Partners
5. Adding & Removing Community Partners
6. Creating & Editing Workflows

7. Creating & Editing Surveys
8. Reporting Options
9. Adding & Removing Shared Resources

VI. Going Live!

Going live is a process that requires a final check of everything to ensure it is working as it should. Before going live all historical data (current mentor, mentee, and partnership records) should be imported into the system. Once you are confident that everything is in working order, you can sign the Live Sign-Off form.

Live Sign-Off

Similar to the User Acceptance Testing Sign-Off, the Live Sign-Off form formalizes the completion of all development and implementation work. Any changes after this sign-off will be considered an integration of new business requirements into the current software. Before you Sign-Off, however, ensure that you understand the support process for any issues that may come up in the future. Meet with the vendor's support team and establish a communication plan and clear support process. Furthermore, if you require any more professional development with regards to the software, this would be the time to seek support.

VII. Staying Ahead of the Curve: Software Modifications for Changing Program Needs

MentorMatch is built to adapt to your program if it should change. Depending on your changes – whether they are minor process changes or major program changes – you have two options to go about the changes.

What You Can Do Yourself

If you are expecting changes to your program refer first to the System Administrator Guide to see if there are instructions on how to make the changes you are considering. One such modification would be changing who is responsible for a task. This will be documented in the System Administrator Guide.

Other such examples of changes include:

1. Adding a Mentoring Coordinator/Coach
2. Adding & Removing Employer Partners
3. Adding & Removing Community Partners
4. Creating & Editing Workflows
5. Creating & Editing Surveys
6. Reporting Options
7. Adding & Removing Shared Resources
8. Changing passwords
9. Change Matching Algorithm
10. Change Questions on the online registration form

Once you find the general area you are looking to change, consider contacting the vendor if the instructions are not clear or for advice.

Contact Vendor

More than just advice, however, you may need to contact the vendor to make changes that are not documented in the System Administrator Guide. An example of such a change would be altering the way report is compiled or adding a new report. As with any developmental changes, you will be required to document your business requirements and submit them to the vendor for advice and a cost estimate.