The $ and Sense of Mentorship: A Case Study with Clark Nuber PS

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Current State

Your Organization
• Have a formal mentorship program
• Have an informal mentorship program
• Would like to introduce a mentoring program

You
• Currently have/had a mentor
• Would like to have a mentor
Why Mentorship?

Your Organization

• Retention
• Employee engagement
• Knowledge transfer
• Diversity and inclusion

You

• Professional development
• Career goals
Retention

• Lower turnover cost
  – 69% higher retention of mentors
  – 72% higher retention of mentees

• Less business disruption

• Improved innovation

• Retain high potential employees
Business Case

Engagement

- More innovative ideas
- Increased discretionary effort
- 2.5 times more likely to complete projects
- 3 times more likely to produce unexpected results
- Organizations with >50% employee engagement = over 80% customer retention
Advancement

• Identify “stars”
• Maximize training investment
• Create pipeline for succession planning
• Promotions
  – Mentors: promoted 6 times more often
  – Mentees: promoted 5 times more often
Behavioral Change

• Improved interdepartmental communication
• Increased communication between levels
• Increased knowledge transfer
• Improved skills of mentees
History of Mentoring

• The term “mentor” came from Greek mythology
  – Odysseus was about to leave on his extended journey and was reluctant to leave his son, Telemachus. Odysseus assigned his friend Mentor to be his son’s guardian and tutor.
  – Mentor assumed the guise of Athena, the goddess of wisdom and the arts, as he interacted with his protégé.

• Past
  – Mentors did the choosing
  – Relationships were relatively rare

• Present
  – New definition and a new look
  – Mentors can be any experienced person helping others
  – Organized mentoring programs exist in public agencies, state and national associations, and in private business and industry
Protégé = Mentee

• Various stages of career development
• Mentee challenge: identifying a mentor with advanced skills in their own career
• Mentoring relationship = partnership
Successful Mentees

Qualities of a Successful Mentee:

• Truly interested in personal and professional growth
• Has a vision of desired outcomes
• Good listener and asks questions
• Committed to learning and developing
• Open and receptive to feedback, guidance, and coaching
Mentee Roles and Responsibilities:
• Takes the initiative/proactive in their development
• Participates in open and honest discussions
• Uses mentor’s guidance and time effectively
• Establishes mutually clear developmental goals
• Sensitive to mentor’s needs
• Meets regularly with mentor
Successful Mentors

Qualities of An Effective Mentor

• Inventive in developing learning opportunities
• Sensitive to others’ experiences and struggles
• Professional and personal stability
• Knowledgeable about their field
• Connected to resources
• Respect for mentee and their individual differences
Mentor Roles and Responsibilities

• Willing to commit to the mentoring process
• Assists in developing mentee’s goals
• Assumes four main roles:
  – **Teacher:** Assists in setting developmental goals and plans
  – **Counselor:** Discusses work-related concerns impeding career growth
  – **Guide:** Shares organizational knowledge from personal experience
  – **Challenger:** Provides objective and honest feedback
The Clark Nuber Way...

Our Mission:
To enhance communication, to identify specific goals, to promote and improve professional and personal development, and to ensure professional growth.

Program Foundation:
The foundation of our program is to build essential leadership skills and help employees advance in their careers.
Firm Expectations

• Improve performance of firm
• Improve communication
• Promote sharing of ideas
• Mentees experience growth in job performance, relationships and technical information
• Mentors have an opportunity to “make a difference” and a contribution to their organization, profession and life
• Promote a supportive, cooperative, and productive environment
Laying The Framework

Early 2000

- Buddy Program
- Surveying your people
- Focus group

Key takeaways from the focus group

- Need a guide
- Need help selecting a mentor
- Need training: “What am I supposed to do with my mentor/mentee?”
Mentoring Program Today

• The Big Picture
• Getting Started
• The Year Unfolds
• Evaluations and Reports
• Appendix
The Big Picture

- What is Mentoring?
- How Does it Work at Clark Nuber?
- Guiding Principles
- What’s In It For Me?
- The Relationship
• Mentor Roles and Responsibilities
• Responsibilities of Performance Manager vs Mentor
• Qualities of an Effective Mentor
• Mentee Roles and Responsibilities
• Qualities of an Effective Mentee
Guiding Principles

• Both mentor and mentee make a 12-month commitment
• Relationship is based on confidence and trust
• Meetings are a non-judgmental, confidential forum
• Mentors: at least 1 level above mentee or 2+ years more experience
• New Mentees: Human Resources/department heads select mentor
• Returning mentees: may indicate their top 3 choices for a mentor
• Monthly meetings encouraged, with a $25/month budget
• Meeting locations vary; over coffee is encouraged
• Voluntary; all employees are encouraged to participate
• Participants encouraged to attend two in-house training sessions per year.
• Human Resources oversees program
**Performance Manager vs. Mentor**

<table>
<thead>
<tr>
<th>Performance Manager Role (“Supervisor”)</th>
<th>Mentor/Buddy Role (“Advocate”)</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Manage productivity</td>
<td>✓ Typically assignment is someone at the next highest level</td>
</tr>
<tr>
<td>✓ Timely feedback (both positive and negative)</td>
<td>✓ “How to” instruction and guidance</td>
</tr>
<tr>
<td>✓ Accountability</td>
<td>✓ Sounding board</td>
</tr>
<tr>
<td>✓ Goal setting &amp; achievement</td>
<td>✓ Goal setting &amp; achievement</td>
</tr>
<tr>
<td>✓ Manager will participate in annual review meeting (with department head)</td>
<td>✓ Regular meetings</td>
</tr>
</tbody>
</table>
Getting Started

• Finding Your Mentor
• Buddy Agreement
• Preparing to Meet with Your Mentor
• Preparing to Meet with Your Mentee
  – First Meeting Agenda
  – Getting –to-know-you Questions
Getting Started

• Finding Your Mentor
  – Who do I respect and admire?
  – Who displays the type of leadership skills I would like to develop?
  – Who is strong in the areas I need help?
  – Do we share similar career goals and aspirations?
  – Will this mentor be able and willing to devote the time and effort I need?

• Perform Due Diligence
  – Exploratory interview
  – Explore similarities
  – Clarify expectations up front
Buddy Agreement
(Form)

This buddy agreement sets forth how we will work together. We want this to be a productive and rewarding experience, with most of our time together spent in collaborative development activities. To minimize the possibility of confusion in our mentoring relationship, we have agreed to the following:

This agreement will cover the period from: __________ to __________
Mentee: ___________________
Mentor: _____________________

Frequency of the meetings: _______________________

Approximate amount of time to be invested by the mentor: _______________________

Expectations:
__________________________________________________________________________
__________________________________________________________________________

Agreement for handling confidentiality:
__________________________________________________________________________
__________________________________________________________________________

Specific role of the mentor (model, guide, observe and give feedback, recommend developmental activities, facilitate learning, suggest/provide resources, etc.)
__________________________________________________________________________
__________________________________________________________________________

The skill areas to be the focus of the current development period are noted on the individual development plan maintained by the mentee:
__________________________________________________________________________
__________________________________________________________________________

Objectives and additional points:
__________________________________________________________________________
__________________________________________________________________________

Mentee/Date
Mentor/Date

This form is located on the Employee & Career Development subpage on the HR Page of the Intranet
The Year Unfolds

• A Typical Year’s Schedule
• Personal Development Plan
• Meeting Agenda Checklist
• Tips for a Successful Partnership
• Confidentiality
• If It’s Not Working
The Year Unfolds: Meetings

Meeting Agenda Checklist
(Form)

Mentor: _________________________
Mentee: _________________________
Main Focus: _________________________

Please record the date of your meeting by filling in the year and placing a check mark (✓) beneath the corresponding month.

<table>
<thead>
<tr>
<th>Year</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
</table>

**Discussion Items and Meeting Notes**

<table>
<thead>
<tr>
<th>Any department/firm news (changes in status of the firm, practice development, client services, new policies, etc)</th>
<th>Action Items</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Progress made/success to celebrate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discuss follow-up items from previous meeting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discuss specific goals/topics from previous meeting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review client assignment schedule and/or discuss current and future projects</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Challenges or concerns (situations and feelings about them)</td>
<td></td>
<td></td>
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<tr>
<td>Review progress on Personal Development Plan</td>
<td></td>
<td></td>
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<tr>
<td>Review progress on professional goals</td>
<td></td>
<td></td>
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<tr>
<td>Review progress on Marketing plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review and discussion around the expectations grid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discussion around future advancement – steps to take, advice</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Follow-up actions for Mentee, for Mentor</strong></td>
<td></td>
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</tbody>
</table>

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Gathering feedback from program participants helps your organization continue to improve

- Mid-Cycle Review – Mentee Evaluation of Mentor
- Program Evaluation – End of Program
**Mid-Cycle Review**

Date: ________________________
Mentee name: ____________________________
Mentor name: ____________________________

On a scale of 1 to 5, with 5 indicating strongly agree and 1 indicating strongly disagree, please indicate your satisfaction with the following aspects of your mentoring relationship.

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mentoring partnership is working well</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Meetings are regular</td>
<td></td>
</tr>
<tr>
<td>Appropriate amount of time has been devoted to program</td>
<td></td>
</tr>
<tr>
<td>Personal and professional development issues have been established</td>
<td></td>
</tr>
<tr>
<td>Clear goals and objectives have been set</td>
<td></td>
</tr>
<tr>
<td>Trust and confidentiality have been established</td>
<td></td>
</tr>
<tr>
<td>Buddy listens well and is responsive (Indicate person being evaluated)</td>
<td></td>
</tr>
<tr>
<td>Progress has been observed over the past six months in areas chosen for development</td>
<td></td>
</tr>
<tr>
<td>Barriers encountered during mentoring process have been resolved</td>
<td></td>
</tr>
<tr>
<td>Topics to be discussed over the next six months have been defined</td>
<td></td>
</tr>
<tr>
<td>Program is meeting expectations</td>
<td></td>
</tr>
<tr>
<td>Mentoring relationship should continue</td>
<td></td>
</tr>
</tbody>
</table>

Additional comments:
Appendix

- Strategic Map (Plan)
- Annual Firm Goals
- Practice Group Goals
- Anti-Harassment Policy
- Additional Suggested Meeting Topics
- Audit Expectations Grid
- Tax Expectation Grid
## Program Effectiveness

### Characteristics of Ineffective Formal Mentoring Programs
- Mentor and mentee matching is ad-hoc, not based on assessment
- Lacks formal goals or objectives
- No clear time frame or time commitment required
- No monitoring or check-ins
- No accountability
- No clear tie to business efforts exist

### Characteristics of Effective Formal Mentoring Programs
- Mentors and mentees matched based on skills/development needs
- Formal goals are outlined and tracked
- Minimum time commitments are designated
- Formal process exists for monitoring the relationship
- Both parties are held accountable; links to talent management exist
- Links to business strategy, goals exist
Where To Begin

Designing and Proposing a Program

• Why? What is the program’s purpose?
• Enlist buy-in from the top
• Employee input (focus group, survey, interviews)
• Determine the process to determine the approach
• Document the Plan
• Present the plan to the CEO (decision makers)
• Implement
• Evaluate
Return On Investment

• Why ROI Is Important
• Determining the ROI
• ROI Metrics
  – Decreased turnover
  – Increased engagement
  – Increased performance
• Measure Baseline!
ROI Calculation

\[
\frac{[R + (E + A)]}{C} = \text{ROI}
\]

or

\[
\frac{[\text{Retention} + (\text{Engagement and Advancement})]}{\text{Program Cost}} = \text{Return on Investment}
\]
Return On Investment

ROI Calculation:

Retention = (5% x $150,000) x 5 = $750,000
Engagement = (20% x $100,000) x 5 = $100,000

Program Cost = $170,000

or

($750,000 + $100,000) = $850,000 ÷ $170,000

= 5 X Return on Investment
What NOT To Do

• Begin a mentorship program “because everyone else is.” \textit{Start with a goal in mind.}

• Do it like \textit{_____ Company. Must be customized for your organization.}

• “It’s up to the mentor.” \textit{Make the mentoring relationship the mentee’s responsibility.}

• Assume the mentors know what to do. \textit{Train all participants on the details and expectations.}

• Let it function on auto-pilot. \textit{Mentorship programs require care and feeding.}
Checklist

✓ 12-month commitment for both
✓ Mentee and mentor choose each other
✓ Initial training session
✓ Established developmental goals
✓ Monthly meetings
✓ Open and honest relationship
✓ Regular progress checks
✓ Program evaluations by all participants
✓ Determine ROI: metrics and evaluations
What Mentees Say

Benefits Of Having A Mentor

1. I don’t have to know it all
2. I have someone to talk to without there being a conflict of interest
3. It helped me become more self-aware
Benefits Of Being A Mentor

1. Closer relationships with my peers
2. Professional network expanded exponentially
3. Opportunity to contribute to and develop the next generation of my profession.
Do YOU Have A Mentor?

• Why you should consider having a mentor
• Finding your own mentor
Resources

- So You Want To Start A Mentorship Program by Nancy Kasmar
- Mentoring for Success by Elizabeth Weinstein, Ph.D.
- The ROI of Mentoring, Coaching, and Other Employee Development Programs (Chronus)
- Making Mentoring Work (Catalyst)
- How to Build a Mentoring Program: A Mentoring Program Toolkit (USPTO)
Contact Information

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Compensation Connections® is a Seattle-area consulting firm advising organizations in matters related to total rewards. The firm is owned by Nancy Kasmar and Shannon Drohman. With more than 30 years of combined experience in HR and compensation, the principals of Compensation Connections have assisted hundreds of organizations with the design or revision of their compensation and reward programs.

We primarily serve organizations in the Pacific Northwest, most often in the greater Puget Sound region. We have a wide range in client size, from small start-ups to well-established organizations with thousands of employees. Our industry mix includes education, social services, housing, technology, manufacturing, construction, financial services, healthcare, municipal government, quasi-governmental, conservation, and professional services.

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Clark Nuber is a leading Northwest firm with the soul of a small office. Having a positive impact on each other, our clients, and our community is the way we do business. It’s a principle we’ve been practicing for over sixty-five years. We are an award-winning CPA and consulting firm:

- 2015 Great Place to Work (Great Place to Work Institute)
- 2015 Gold Fit-Friendly Worksite (American Heart Association)
- 2010, 2013, 2014, 2015 Best Accounting Firms to Work For (Accounting Today and Best Companies Group)
- 2013, 2014 one of the Best Public Accounting Firms for Women (Accounting & Financial Women's Alliance and AWSCPA)
- 2007, 2008, and 2009 one of 50 Best Small & Medium Companies to Work For in America (Great Place to Work Institute and the Society for Human Resource Management)