Virtual Mentoring for Volunteer Leadership Development

by

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M.A., Concordia University, 2006
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Abstract

Calls to investigate leadership development in the nonprofit and voluntary sector have been put forth as concerns about leadership succession have increased. To respond to this call to investigate this under-researched area, this design-based, multiple case study provides rich, thick descriptions of the development of the mentoring relationships, between mentor and mentee pairs, over the course of a virtual mentoring program for volunteer leadership development, in a Catholic nonprofit. I explored how participants’ perceptions of their online interactions shaped their experiences and the development of their mentoring relationships while examining the extent to which mentoring contributed to a greater willingness, on the part of mentees, to accept volunteer leadership opportunities. The findings of this study lay the groundwork for future research into virtual mentoring environments for volunteer leadership development.

The experiences of seven mentor-mentee case pairs were examined to explore the development of their mentoring relationships. Each pair’s online interactions were observed for six months, from the initial orientation session until the final note was posted. Participants were interviewed two months, four months, and six months into their participation. Data from online communications, weekly logs, and questionnaires were triangulated against mentor and mentee perceptions that emerged within the context of virtual mentoring for volunteer leadership.

The compatibility between mentor and mentee expectations, with respect to mentoring approach and mentoring environment, contributed to perceptions about the quality of the mentoring relationship. The CLM was generally perceived by mentees to contribute to leader development, although relationships in which the mentor used a contribution-oriented approach, rather than a guidance-oriented approach, was found to be more complementary to the supports offered by the program. Design considerations include mitigating communication delays and determining whether social media and mobile platforms, which were found to contribute to positive perceptions about the mentoring experience, can forward program goals. The findings have implications for leadership, based on notions of social participation, in which the meaning of willingness to lead shifts from that of formal acceptance of a leadership position to greater participation in leadership activities.

Keywords: Virtual mentoring; leadership development; volunteer leadership; mentoring relationships; design-based research; case studies
Dedication

To my family
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I would like to thank Dr. Kevin O'Neill, my senior supervisor, who provided me with opportunities to learn about design-based research, beginning when I became his research assistant on a study he was conducting with Dr. Özlem Sensoy. I am thankful to both of them for those first experiences on a research team, and I am also grateful for the insights gained as a member of Kevin’s team since those early days of my PhD. I am, above all, deeply appreciative of the encouragement and support that he has given to me as his student. I am fortunate to have had a senior supervisor with whom I could openly and regularly speak.

I would also like to thank my two supervisors, Dr. Cheryl Amundsen and Dr. Neil Abramson, whose input was critical to the writing of this thesis. Cheryl's guidance was clear and incisive. I take from our discussions the importance of striving for quality and integrity in research. From Neil, I take with me insights gained from the discussions we had about my thesis. I am thankful for his challenging of my thinking; his sharing of anecdotes and wisdom; and his offering of advice and encouragement.

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I would also like to thank Frank Zander for providing me with support in using Audio Re-
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next generation: Hey, Zachary, Emmanuelle, Kyle, and the rest of the little ones! These
children were one of the reasons why my trips home were always the most wonderful of
breaks from the grind.)

Finally, I would like to thank my host organization and my participants, who agreed to
share their experiences so that this study could be.
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List of Acronyms

CLM  Catholic Leadership Mentoring Program
DBR  Design-based research
LMX  Leader-member exchange theory
NGO  Nongovernmental organization
NSNVO National Survey of Nonprofit and Voluntary Organizations
RNGO Religious nongovernmental organization
## Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asynchronous Communication</td>
<td>a non-simultaneous form of communication</td>
</tr>
<tr>
<td>Case Study</td>
<td>a research approach in which the inquiry aims to investigate a bounded unit or system (Stake, 1978)</td>
</tr>
<tr>
<td>Categorical Aggregation</td>
<td>a form of case study analysis where data is explored for a set of instances, from which one can gain insight on issues relevant to the phenomenon being studied (Creswell, 2007; Stake 1995)</td>
</tr>
<tr>
<td>Coaching</td>
<td>a support provided with the intention to guide to a particular end, which is often tied to performance (D’Abate, Eddy, &amp; Tannenbaum, 2003)</td>
</tr>
<tr>
<td>Coaching</td>
<td>Coaching can be viewed as part of a set of instrumental mentoring functions (Kram &amp; Isabella, 1985; Bierema &amp; Hill, 2005).</td>
</tr>
<tr>
<td>Cohesion Commitment</td>
<td>a commitment “of actors to group solidarity, to a set of social relationships...” (Kanter, 1968, p. 500)</td>
</tr>
<tr>
<td>Cohesion Commitment</td>
<td>Cohesion commitment involves the social ties developed within or through an organization (Kanter, 1968; Kanter, 1972; Pearce, 1993)</td>
</tr>
<tr>
<td>Constructionism</td>
<td>an epistemology wherein knowledge and ways of being are believed to be constructed and negotiated as a person interacts and engages with the world</td>
</tr>
<tr>
<td>Constructionism</td>
<td>Constructionism is also a learning theory in which learners engage with the construction of sharable artifacts that are meaningful representations of their understandings (Jonassen, Myers, &amp; McKillop, 1996).</td>
</tr>
<tr>
<td>Continuance Commitment</td>
<td>“commitment of actors to participating in the system, remaining members...commitment to a social system role.” (Kanter, 1968, p. 500)</td>
</tr>
<tr>
<td>Continuance Commitment</td>
<td>Continuance commitment involves ties relating to the continued survival of the organization (Kanter, 1972; Pearce, 1993)</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
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<tr>
<td>Contributory Approach</td>
<td>a mentoring orientation used by mentors to contribute to the mentoring task by sharing their personal insights and experiences with their mentees, who are then encouraged to reflect upon the information in a personally relevant way. This approach is also referred to as a contribution-oriented approach. It is based on the sharing approach to mentoring used by CLM Mentors 8, 9, and 10.</td>
</tr>
<tr>
<td>Design-Based Research</td>
<td>“a series of approaches, with the intent of producing new theories, artifacts, and practices that account for and potentially impact learning and teaching in naturalistic settings” (Barab &amp; Squire, 2004)</td>
</tr>
<tr>
<td>Design-based research</td>
<td>affords the holistic study of learning systems (Brown, 1992). It is based on constructionist epistemology.</td>
</tr>
<tr>
<td>Direct Interpretation</td>
<td>a form of case study analysis by which one gains insight and draws meaning from one particular instance (Creswell, 2007; Stake, 1995)</td>
</tr>
<tr>
<td>Emergent</td>
<td>in the process of negotiation and organization through iterative, relational, or systemic construction and meaning-making</td>
</tr>
<tr>
<td>Epistemology</td>
<td>the philosophical study of knowledge; specifically, it involves studying belief systems about what can be known and how it can be known</td>
</tr>
<tr>
<td>Explicit Knowledge</td>
<td>a form of knowledge that can be articulated (Polanyi, 1983; Cook &amp; Brown, 1999)</td>
</tr>
<tr>
<td>Explicit knowledge</td>
<td>can be verbalized and written and, thus, codified. Cook and Brown identify concepts as being explicit, individual knowledge. Stories are identified as explicit, group knowledge.</td>
</tr>
<tr>
<td>Facilitation</td>
<td>a support provided by which discussions are guided so that a variety of perspectives, deeper insights, or shared understandings are gained by learners or participants; it is often used within educational settings (Wise &amp; O’Neill, 2009; Rovai, 2007)</td>
</tr>
<tr>
<td>Governance</td>
<td>the strategic process by which organizational leadership is provided (Renz, 2010)</td>
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</table>
Guidance Approach  a mentoring orientation used by mentors to guide their mentees' thinking to particular ends, such as improved performance or depth in discussion

This approach is also referred to as a guidance-oriented approach. It is based upon the coaching approach to mentoring, used by CLM Mentors 4 and 5, and the facilitative approach to mentoring, used by CLM Mentors 6 and 7.

Instrumental Case  a kind of case study that facilitates understanding of the processes, relationships, and issues that relate to a phenomenon (Stake, 1995)

Leader  an individual who exerts influence on others so that a common goal can be achieved

Leader Development  the activities and events designed to further an individual's growth and learning as a leader (Day, 2001; Uhl-Bien, 2006)

Leader-Member Exchange Theory  a theory that investigates leadership from the perspective of the interactions between a leader and a member (Graen & Uhl-Bien, 1995)

Leadership  "a process whereby an individual influences a group of individuals to achieve a common goal" (Northouse, 2007, p. 3)

Other definitions have been proposed. Another definition defines leadership in relational terms. This definition, proposed by Uhl-Bien (2006), is that leadership is “a social influence process through which emergent coordination (i.e., evolving social order) and change (i.e., new values, attitudes, approaches, behaviors, ideologies, etc.) are constructed and produced.” (p. 668)

Leadership by Default  a perspective describing a situation, observed in voluntary organizations, in which members prefer not to accept leadership opportunities, thereby leaving the task of leading the organization to the few members who are willing to take on these responsibilities, during their leisure time (Pearce, 1993)

Self-interest is viewed as the principal reason for volunteers' lack of motivation to accept leadership responsibilities (Markham, Walters, & Bonjean, 2001; Pearce, 1993).

Leadership Development  the processes and activities designed to increase an organization's leadership capacity (Day, 2001; Hailey, 2006)
Leadership-Making  
a model by which role-making processes, which occur within a relationship between a leader and a follower, are ideally theorized to shift relationships through phases of being strangers, being acquaintances, and being in a mature partnership (Graen & Uhl-Bien, 1991)

Leadership-making is influenced by the characteristics of the leader; the characteristics of the follower; and the maturity of the leadership relationship. The leader and follower shift from a transactional relationship to a transformational relationship as the relationship matures.

Leadership Succession  
the processes developed to identify, prepare, and select members of an organization for the assumption of leadership positions (Friedman, 1986)

Learning Sciences  
a field that investigates learning from a constructionist epistemology, where the learner actively participates in the meaning-making processes of learning (Jonassen, Cernusca, & Ionas, 2007; Jonassen, Myers, & McKillop, 1996)

Research is conducted by studying how learners construct their knowledge, as they engage with resources and other participants, in an environment designed to afford particular kinds of learning. This orientation is called design-based research (DBR).

Martyred Leader  
a volunteer leader who is admired by organizational members, but who is left with the majority of the workload within voluntary organizations (Pearce, 1993)

Mentee  
a less experienced or less knowledgeable person who receives mentoring support and guidance

A mentee is also referred to as a protégé.

Mentor  
a more experienced or more knowledgeable person who provides mentoring support and guidance

Mentoring  
a developmental relationship, traditionally defined as occurring when a more experienced mentor provides guidance and support to a less experienced protégé or mentee (Daresh, 1995; Wilson & Elman, 1990)

Mentoring can also be defined as a process by which a person is made aware of the ways of being or thinking shared by a particular group of people.

Mentoring Environment  
an environment, usually employing digital technology, that is designed to facilitate mentoring
Multiple Case Study

a case study approach in which a collection of individual cases are analyzed to provide an understanding of a phenomenon. Stake (2006) refers to this phenomenon as a quintain.

Naturalistic Generalization

“conclusions arrived at through personal engagement in life’s affairs or by vicarious experience so well constructed that the person feels as if it happened to themselves” (Stake, 1995, p. 85)

Stake (1995) explains that rich, thick description; narrative accounts; stories; and case studies facilitate naturalistic generalization. Naturalistic generalization is dependent upon how readers engage with these accounts in relation to their own personal experiences.

Nonprofit Organization

a self-governing, nongovernmental organization that does not generate profits for its owners or directors (Hall, De Wit, Lasby, McIver, Evers, Johnston, et al., 2005)

For the purposes of their study, Hall et al. also defined nonprofits as being voluntary organizations that have been incorporated or registered.

Ontological Innovation

“the invention of new scientific categories, specifically categories that do useful work in generating, selecting among, and assessing design alternatives” (diSessa & Cobb, 2004, p. 78)

Ontological innovation enables attributions to be made about a phenomenon, thereby enabling for design decisions to be made in reference to a phenomenon’s relationship to learning.

Ontology

the philosophical study of the nature of reality or being

Position Power

a power that leaders have because of their hierarchical position (French & Raven, 1960)

Pragmatism

an epistemology that assumes a reality that cannot be known directly; therefore, knowledge is obtained through empirical and rational processes and is provisional and partial (Driscoll, 2000)

Dewey (1938/1997) asserts that experience is essential to learning how to select appropriate ends and goals for future growth, during the process of productive inquiry (Cook & Brown, 1999).

Realism

an ontology in which an objective reality exists (Uhl-Bien, 2006)

Driscoll (2000) also classifies realism in relation to epistemology and “[t]he belief that things in the world can be known directly”. (p. 14)
<table>
<thead>
<tr>
<th>Term</th>
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<tr>
<td>Referent Power</td>
<td>A power that a follower confers upon a leader because the former likes or identifies with this particular leader (French &amp; Raven, 1960)</td>
</tr>
<tr>
<td>Situated Phenomenon</td>
<td>An issue, activity, or situation that is bounded by its context and circumstances. Its meaning is negotiated, constructed, and specific to the particular circumstances in which it is observed.</td>
</tr>
<tr>
<td>Social Constructionism</td>
<td>An ontology in which a reality is believed to be interdependently constructed in a process of ongoing negotiation between the &quot;self and the world&quot;; multiple realities are believed to exist (Uhl-Bien, 2006, p. 659)</td>
</tr>
<tr>
<td>Synchronous Communication</td>
<td>A form of simultaneous communication</td>
</tr>
<tr>
<td>Tacit Knowledge</td>
<td>A form of knowledge that cannot be described or explained verbally (Polanyi, 1983; Cook &amp; Brown, 1999)</td>
</tr>
<tr>
<td>Tacit knowledge</td>
<td>Tacit knowledge is acquired through experience and practice; the tacit is learned in its doing (Cook &amp; Brown, 1999). Cook and Brown identify skills as being tacit, individual knowledge. Genres are identified as being tacit, group knowledge.</td>
</tr>
<tr>
<td>Thick Description</td>
<td>An account that provides rich and contextual detail, thereby facilitating insights and naturalistic generalization</td>
</tr>
<tr>
<td>Virtual Mentoring</td>
<td>A form of mentoring that occurs when mentors and mentees communicate, at a distance, with each other</td>
</tr>
<tr>
<td>Virtual Mentoring</td>
<td>It is mediated by various forms of technology, such as email, discussion forums, or videoconferencing (Bierema &amp; Merriam, 2002). It is also known as e-mentoring or telementoring.</td>
</tr>
<tr>
<td>Voluntary Organization</td>
<td>An organization that achieves its goals primarily through the work of volunteers</td>
</tr>
<tr>
<td>Voluntary Organization</td>
<td>Voluntary organizations may have employees, but volunteers contribute the bulk of the work needed to accomplish organizational objectives (Pearce, 1993).</td>
</tr>
<tr>
<td>Volunteer</td>
<td>An unpaid worker (Pearce, 1993)</td>
</tr>
<tr>
<td>Volunteer Leader</td>
<td>An unpaid worker who assumes the responsibility to influence others to achieve a common goal, within a voluntary organization</td>
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Chapter 1.

Background and Rationale

1.1. Introduction

This study explored a virtual mentoring environment for volunteer leadership development within a Catholic nonprofit. A design-based research (DBR) orientation (Barab & Squire, 2004; Brown, 1992; diSessa & Cobb, 2004) and a multiple case study approach (Stake, 2006) were used to research volunteer leadership development. As such, this study is based on the constructionist epistemology (Jonassen, Myers, & McKillop, 1996) of the learning sciences, an academic discipline where “learning...is activity or practice based...[and lies at] the convergence of activity systems, cognition, and sociocultural context.” (Jonassen, Cernusca, & Ionas, 2007, p. 47).

Constructionist perspectives view learning as a process by which learners actively construct meaning as they interact and engage with their environment and those within it (Jonassen et al., 1996). The learning sciences are also pragmatic, focusing on the instrumentality of experience-based learning for growth (Dewey, 1938/1997; Driscoll, 2000), and seek to develop theories and innovations that can inform and that can be used in practice (Brown, 1992; Jonassen et al., 1996). Consequently, the field’s research on learning involves the systemic study of how learners participate within environments that promote authentic meaning-making to developing their understanding, such as developing an understanding of volunteer leadership, through discussions with those who have been or are actively engaged in leading in this context. This approach to research involves the design of environments that afford particular understandings or ways of being, as participants engage with and in it (Barab & Squire, 2004; Brown, 1992; Jonassen et al., 2007; Sandoval, 2004). The participants’ interactions and engagement with the environment are systemically and iteratively investigated to develop theories
about learning, in terms of complex understanding, conceptual change, or ways of being. This research orientation is referred to as design-based research (Jonassen et al., 2007).

To explore the under-researched area of volunteer leadership development, I brought with me approaches and perspectives, which have proved useful in studying learning and development, within the fields of education (Barab & Squire, 2004; Brown, 1992; Jonassen et al., 2007) and organizational learning (Cook & Brown, 1999; Lave & Wenger, 1991; Wenger, 1998). The goal of this research was exploratory, laying the foundation for future research at the intersection of virtual mentoring environments; volunteer leadership; and nonprofit leadership development and succession. Stake’s approach to multiple case study also provided for the qualitative and inductive approach required to gain insights into future areas of exploration while also providing for thick, rich descriptions of how mentor-mentee relationships developed over the course of the virtual mentoring program.

During the early stages of design-based research, this initial exploration is critical to informing how one conceptualizes the mediating processes and outcomes that a particular learning environment’s design is to afford (Sandoval, 2014), especially for new areas of research such as virtual mentoring for volunteer leadership development. This study was designed to contribute to an understanding of these processes and outcomes. Questions about the nature of leadership, leader development, and leadership development emerged during this exploration. These issues reflect the relational perspective of leadership, which views leadership as co-constructed and negotiated in situ (See Relational Approaches). As such, questions regarding the appropriate nature of outcomes for this mentoring environment, such as greater participation in leadership activities as well as questions of leader identity and formal leadership roles emerged. Issues concerning how to conceptualize these processes and outcomes are part of the narrative presented within this thesis report (See Negotiating Ontological Issues).
1.2. Overview

In this chapter, I discuss the background and build a rationale for conducting research into virtual mentoring environments for leadership development in voluntary organizations. To build this rationale, I first begin by providing background on the importance of leadership in guiding an organization to success and the need for research into leadership development in the nonprofit, voluntary sector, especially as it relates to mentoring. I provide evidence to support the use of mentoring as a means for leadership development and provide background into this area of study. Virtual mentoring programs are then discussed as having potential for addressing the concerns of voluntary organizations for leadership development. Based upon insights gained from various fields, I argue for using design-based research to study virtual mentoring environments to support volunteer leadership development. The research questions for this study will then be discussed. I conclude by presenting a table that outlines the thesis chapters to follow and makes evident the rhetorical structure of the report, which is in keeping with design-based and multiple case study research.

1.3. The Importance of Leadership to Organizational Success

The question of who will be leading organizations into the future has become a concern in many fields (Day, 2001; Day & Halpin, 2001), including business (Barnett & Davis, 2008; Holton & Lynham, 2000); education (Lewis & Murphy, 2008; Pisapia, Pang, Hee, Lin, & Morris, 2009); health care (Groves, 2007); the public sector (Lynn, 2001); and, increasingly, the nonprofit sector (Brown, 2007: Bugg & Dalhoff, 2006; Camplin, 2009; Hall, De Wit, Lasby, McLver, Evers, Johnston, et al., 2005; Hailey, 2006; Hailey & James 2004; Paton, Mordaunt, & Cornforth, 2007; Siddiqi, 2001). Leadership development and succession pose serious challenges for organizations (Day, 2001; Pisapia, Reyes-Guerra, & Coukos-Semmel, 2005; Riggio, 2008), and both are critical in enabling an organization to establish its direction, accomplish its goals, and achieve long-term viability (Day, 2001; Day & Halpin, 2001; Groves, 2007; Lewis & Murphy, 2008; Pisapia et al., 2005; Riggio, 2008). While leadership development involves increasing the overall leadership capacity of organizations (Day, 2001; Riggio, 2008),
leadership succession involves the planning and implementation of strategies that support a continuance of leadership within an organization (Barnett & Davis, 2008; Groves, 2007; Lynn, 2001). Literature indicates that organizations must systematically plan for leadership succession and link these processes to leadership development activities at all levels of the organization if these initiatives are to be more effective (Barnett & Davis, 2008; Groves, 2006; Hailey & James, 2004; Lynn, 2001).

Leadership, itself, has been defined in various ways. Northouse (2007), based on his review of leadership theory, proposed that leadership be defined as “a process whereby an individual influences a group of individuals to achieve a common goal” (p. 3). Another perspective views leadership as an emergent and co-constructed process or outcome (Drath, McCauley, Palus, Van Velsor, O’Connor, & McGuire, 2008; Uhl-Bien, 2006). Despite these differences in perspective, which will be discussed in the literature review (See Relational Approaches), researchers agree that organizations require leadership to set and meet organizational goals. Given the importance of leadership to organizational success, leadership development has become one of the most researched areas in the field of human resource development (Ardichvili & Manderscheid, 2008; Day, 2001). The business sector recognizes the criticality of leadership and much of the literature on leadership development has been conducted within for-profit organizations (Hailey & James, 2004; Siddiqi, 2001). Recently, the nonprofit sector has begun to turn its attention to similar concerns (Hailey & James, 2004; Paton et al., 2007; Siddiqi, 2001).

1.4. The Nonprofit Sector: A Reliance on Volunteers

Reports from Canada (Bugg & Dalhoff, 2006; Hall et al., 2005) and the United Kingdom (Hailey, 2006) have called for increased research into nonprofit organizations, many of which rely heavily or exclusively on volunteers for human capital (Hall et al., 2005; Paton et al., 2007). According to findings from the National Survey of Nonprofit and Voluntary Organizations (NSNVO), which was administered across Canada by Hall et al., this sector contributes to the quality of life of Canadians in diverse ways. However, despite its contribution to society, very little is known about it (Hall et al., 2005). The report states,
Nonprofit and voluntary organizations, an important element of Canadian society, often address needs and interests of citizens that governments and the private sector do not. Although the presence of these organizations is felt in virtually every community, they have not been studied extensively. We have little knowledge of their numbers, their contributions, or the resources they require to fulfill their missions. (Hall et al., 2005, p. 5)

The NSNVO was also specifically designed to collect data about organizations' concerns about not fulfilling their missions due to difficulty in securing monetary and human capital. These concerns had been revealed during the initial qualitative segment of the study (Hall et al., 2005). These difficulties were reiterated in the findings of the National Study of Board Governance Practices in the Non-Profit and Voluntary Sector in Canada (Bugg & Dalhoff, 2006). Bugg and Dalhoff (2006) state that difficulty in attracting volunteers to sit on boards exists and that this challenge extends to attracting chairs. Despite these issues, only 52% of respondents stated that formal succession planning processes were in place to recruit board members, with only 32% of respondents indicating that “they had a formal process for selecting and mentoring board and committee leaders” (Bugg & Dalhoff, 2006, p. 27). Given that formal leadership succession and development activities were not widespread, it is not surprising that 31% of respondents reported having “difficulty filling board seats” (Bugg & Dalhoff, 2006, p. 27).

Bugg and Dalhoff also note that the volunteer pool for organizations is shrinking because of environmental and demographic changes. As nonprofit leaders have become older, the need to find a new generation of leaders has become more urgent. However, the nonprofit sector has experienced a shift in its environment, wherein the roles and responsibilities of leadership have become increasingly professionalized (Bugg & Dalhoff, 2006; Paton et al., 2007). Further, organizations are finding that their volunteer base is graying and that attracting volunteers from a younger demographic is difficult (Bugg & Dalhoff, 2006).

The challenge for such organizations is to increase the willingness of its volunteers to accept leadership positions (Bugg & Dalhoff, 2006; Markham, Walters, & Bonjean, 2001; Pearce, 1993). Volunteers do not want to commit to long-term board appointments (Bugg & Dalhoff, 2006). When volunteers do commit to leadership
positions, they often do not realize the extent of the demands required by leadership and have difficulty coping with their tasks (Guloy, 2006; Pearce, 1993). Researchers must provide theories, tools, and models that will help organizations to increase their capacity for leadership in order to continue providing valuable services to the community. Moreover, Hailey (2006) and Siddiqi (2001) state that the context and concerns of those within this sector are different from those found within the business sector, from which much literature on leadership development and succession has been developed. As a result, research on leadership development and succession that is specific to nonprofit and voluntary organizations is required.

1.5. Mentoring for Leadership Development

One of the most popular interventions for leadership development is mentoring (Barnett & Davis, 2008; Day, 2001; Day & Halpin, 2001; Groves, 2007; Kim, 2007; Stead, 2005). Although definitions of mentoring vary (Jacobi, 1991), the definition used here is based upon a traditional concept of mentoring in which the more experienced mentor provides guidance and support to the protégé or mentee (Daresh, 1995; Wilson & Elman, 1990). Specifically, mentoring is conceived as a developmental relationship in which a more experienced or more knowledgeable person provides guidance, support, and advice to a less experienced or less knowledgeable person to enable that person to become more aware of the ways of being or thinking shared by a particular community. While conflict of interest and power issues have been experienced in mentoring relationships (Hezlett & Gibson, 2005), prompting considerations on mentor matching, such a relationship is thought to have the potential to enhance organizational commitment (Boldra, Landin, Repta, Westphal, & Winistorfer, 2008; Douglas, 1997; Groves, 2007; Scott, 2010); build leadership skills (Boldra et al., 2008; Kim, 2007; Schulz, 1995; Stead, 2005); hasten understanding of an organizational culture (Kim, 2007; Scott, 2010); contribute to the spread of organizational narrative and knowledge to future generations (Camplin 2009; Cullen, Richardt, & Hume, 1997; Douglas, 1997; Wilson & Elman, 1990), and reinforce a culture of learning and development (Griego, Geroy, & Wright, 2000; Groves, 2007; Prewitt, 2003; Riggio, 2008). All of these can contribute to improved leadership development through socialization, a better
understanding of leadership roles, and the building of leadership skills. Given the benefits of formal mentoring programs within business, education, and health sectors, such benefits could very well extend to voluntary nonprofits.

In view of this potential, more research must be conducted on the benefits of formal mentoring programs, especially as they pertain to leadership development. Practitioners clearly use mentoring as a means for developing organizational members into leaders; however, research into leadership mentoring is relatively scarce (Jacobi, 1991; Kim, 2007; Shenkman, 2008). Much of the literature that does exist is situated within the context of corporations (Kim, 2007; Stead, 2005), education (Daresh, 1995; Daresh & Playko, 1995; Hobson, 2003), or professional practice (Boldra et al., 2008; Cullen, Richardt, & Hume, 1997; Giganti, 2003; Holloway, 2004). In addition, the mentoring benefits associated with the development of new leaders are mostly based on self-reported data with assumed outcomes for the organization (Douglas, 1997; Kim, 2007) or based on theoretical perspectives (Schulz, 1995), rather than being grounded in data from observed events. While research into mentoring for professional and leadership development has attracted the attention of human resource development (Hezlett & Gibson, 2005; Kim, 2007; Knouse, 2001; McCauley, 2005; Stead, 2005) and educational leadership (Browne-Ferrigno & Muth, 2004; Daresh, 1995; Daresh & Playko, 1995; Hobson, 2003), research into leadership mentoring has yet to develop in the nonprofit field.

1.6. Virtual Mentoring and Leadership Development

While formal mentoring programs often employ traditional, face-to-face mentoring, some of these programs have goals that have resulted in the development of hybrid mentoring models, such as peer mentoring or group mentoring, according to reviews and commentary by Bierema and Hill (2005); Hezlett and Gibson (2005); and McCauley (2005). One particular mentoring arrangement that holds promise for leadership development is that of virtual mentoring, which is also referred to as e-mentoring or telementoring. Based on a literature review on such programs, conducted by Bierema and Merriam (2002), virtual mentoring allows mentors and mentees to communicate with one another through the use of digital technology, such as email or
discussion forums (Bierema & Merriam, 2002). Bierema and Hill (2005) also discuss its potential as a career development tool for human resources. Meanwhile, evidence that email and other digital forms of communication are already being informally used by mentors and mentees to remain in contact with one another, even when they are involved in face-to-face, formal mentoring programs, has been provided by Houston-Philpot's (2002) case study of Dow Corning Corporation’s leadership mentoring program; Browne-Ferrigno and Muth’s (2004) review of leadership mentoring for principal preparation and their empirical findings from studies conducted at the University of Colorado at Denver; and Scott’s (2010) mixed methods study of a leadership mentoring program.

Scott (2010) found that mentors and mentees participating in a mentoring program for novice Catholic school board principals employed an array of technologies, such as email, to facilitate communications with one another. Scott (2010) states,

A recommendation would be to expand the range of information and communications technologies (ICT) available to principals so that their opportunities for networking, problem-solving, sharing ideas and resources, and moral support be expanded. Introducing ‘webs of enhanced practice’ (Scott and Scott 2010) whereby leaders could use a blended multi-modal approach to communicating with peers, experts, and superordinates would increase the convenience and flexibility of accessing leadership development opportunities. (p. 576)

This recommendation was prompted by the degree to which participants used these technologically mediated forms of communication. In short, virtual mentoring affords the formation of mentoring relationships where it would, otherwise, be difficult because of distance; scheduling; or travel conflicts (Bierema & Hill, 2005; Bierema & Merriam, 2002).

Paton et al. (2007), based on recent trends within the nonprofit sector in the United Kingdom and Europe, also recommend that nonprofit education and development provide leaders with “strategic learning initiatives” (p. 156S) involving the blending of media platforms, which can be used to promote self-directed learning and the development of communities of practice, in reference to general leadership development activity. In their review of professional development and librarianship literature, Ritchie
and Genoni (1999) conclude that mentoring can increase network links between leaders and organizational members as mentors sponsor mentees. In addition, mentoring is believed to contribute to the development of a learning culture on the basis of theoretical analysis (Prewitt, 2003) and empirical research (Groves, 2007). Leader-member exchange theory (see Literature Review: Part I), in which leadership is investigated through the individualized (one-to-one), dyadic relationship that is formed between a leader and a follower, also promotes network formation (Graen & Uhl-Bien, 1995). Moreover, mentoring has been found to correlate with the high-quality dyadic relationships that this theory promotes for leaders and followers (Scandura & Schriesheim; 1994). Research into virtual leadership mentoring provides the opportunity to uncover mentor-mentee interactions that promote high-quality dyadic relationships, which are theorized to promote leader-member networks and may contribute to a culture of leadership development (Groves, 2007). In addition, research conducted in online environments can provide observable data on mentoring relationships that can be triangulated against self-reported data.

1.7. Virtual Mentoring in Voluntary Organizations

Voluntary organizations, in contrast to organizations that rely on paid workers, are heavily dependent upon volunteers to lead, manage, and provide services to their communities. This reliance on unpaid human resources—volunteers—provides for a different context from that experienced by other organizations. Whereas leadership positions are generally attractive to paid workers because of increased remuneration and perquisites, such as receiving administrative support from assistants, a volunteer’s appointment to leadership requires greater involvement and accountability for the organization during what would normally be considered one’s leisure time (Pearce, 1980, 1982, 1993).

Pearce’s (1993) mixed methods research on volunteer organizational behaviour provides insights into the issue of leadership by default (Markham, Walters, & Bonjean, 2001), wherein the challenges of leading an organization fall on the shoulders of the few willing, but not necessarily prepared, to accept the responsibility. Within the Canadian voluntary sector, evidence supports the existence of leadership by default with data
revealing that difficulty exists in the recruitment and retention of volunteer leaders (Bugg & Dalhoff, 2006; Hall et al., 2005). This leadership crisis is further complicated by the organization’s dependence on a core group of volunteer leaders, whose expertise could be lost should these leaders eventually leave the organization (House, 1977; Pearce, 1993). These challenges will be discussed more extensively in Chapter 2.

A mentoring program designed to increase organizational leadership capacity must reduce as many obstacles to participation as possible, given that volunteer leaders are often overworked and members are often reluctant to accept leadership roles (Pearce, 1993). Virtual mentoring provides for an environment in which mentors and mentees can asynchronously communicate with one another at a distance, thereby lessening travel and scheduling constraints. It also provides a means by which past and current organizational leaders can mentor potential or new leaders in another region.

However, the simple provision of a virtual mentoring program does not guarantee its effectiveness in developing an organization’s leadership capacity, such as increasing volunteers’ willingness to accept leadership roles. How such a program can be designed and implemented, in conjunction with the ways in which it can advance leadership development and succession goals, must be explored. This study provided for such an exploration. Specifically, it offered the opportunity to explore the types of mentoring interactions that occur within a virtual mentoring program for leadership development as well as how these interactions can contribute to leadership development and succession goals within voluntary organizations. The kind of research deemed necessary to support this exploration is discussed in the next section.

1.8. Design-Based Research: Virtual Leadership Mentoring in Context

Although the development of formal mentoring programs, in a variety of organizations, has increased as existing studies have provided evidence that participants perceive benefits from mentoring to accrue to mentees, mentors, and organizations (Day, 2001; Douglas, 1997; Hobson, 2003; Jacobi, 1991), the process by which mentoring develops and contributes to these benefits is still not well understood or
easily replicated. As a result, the types of mentoring support and interactions conducive to achieving leadership development goals require greater investigation (Kim, 2007); less is known about virtual mentoring for volunteer leadership. For instance, what are appropriate goals for such programs? Can virtual mentoring afford mentoring functions for volunteer leadership development that are thought to be more easily supported by face-to-face communication? How important are visual cues to mentoring program goals? Moreover, to what extent are such interactions and cues necessary to afford specific kinds of volunteer leadership outcomes?

While greater research attention to this gap will increase understanding, some researchers are concerned about issues that they believe negatively impact the quality of mentoring research conducted. A major concern for some is the lack of conceptual clarity in the literature as to what exactly constitutes mentoring (Jacobi, 1991). Jacobi states that “[m]ethodological rigor is clearly necessary to fully understand the impact of formal mentoring programs, but this is not in itself sufficient. An additional problem is that so-called mentoring programs are so diverse that they actually have little in common.” (p. 517) Moreover, Merriam (1983) states,

The phenomenon of mentoring is not clearly conceptualized, leading to confusion as to just what is being measured or offered as an ingredient in success. Mentoring appears to mean one thing to developmental psychologists, another thing to business people, and a third thing to those in academic settings. (p. 169)

While clearly conceptualizing mentoring or standardizing programs would afford greater ease in the interpretation of research, a more relevant course of action for researchers who aim to guide practitioners would be to investigate those ways in which a mentoring program, designed for a particular context, can achieve specific goals. Thus, the key issue is to ensure that context is not overlooked when conducting research and to accept that it plays an important role in not only determining how a program is designed, but also how mentors and mentees interact to achieve program goals.

Ultimately, mentoring is a situated phenomenon. It is context and activity bound. Thus, I view the nature of mentoring as conflicting with the perspective that it must be defined more uniformly and consistently in research and practice. While I agree that
mentoring conceptions can certainly be clarified, it is unlikely that a unified understanding of mentoring or a standardization of programs will occur, since settings with different sociocultural or organizational norms, values, and goals have different expectations of and for mentoring. For instance, a mentoring program that aims to introduce secondary school students to the ways in which scientists conduct scientific inquiries (O’Neill, Wagner, & Gomez, 1996) will entail different mentoring interactions from that which would be expected within a career development mentoring program (Hezlett & Gibson, 2005). It is unlikely that scientists mentoring students would think it necessary or would be expected to provide career functions, like sponsorship (Hezlett & Gibson, 2005). Yet, sponsorship would be considered a critical mentoring function within the context of a career development program. While certain mentoring functions would apply to both settings, such as introducing a mentee to the norms of a particular profession, it is not a given that mentoring functions and interactions must be similar across environments.

The importance of context in determining the appropriateness and priority of certain mentoring functions and interactions requires research that systematically and holistically investigates mentoring programs in situ, while also assessing the degree to which program goals are attained. A design-based research (DBR) orientation was selected for this study because it affords the pursuit of such research goals. It achieves these goals because the researcher-as-designer is able to generate and refine theory by examining how well expected outcomes, based on theoretical conjectures embodied within the design of the program, are met (Sandoval, 2004; Schoenfeld, 2006). In other words, the program is designed with the belief that certain interactions will be facilitated by the design, which will thereby lead to certain changes in understanding, attitude, or behaviour. If these expectations are not met, the researcher can analyze why a design embodying a particular theoretical conjecture (Sandoval, 2004) did not afford such a change. Based on this analysis, subsequent modifications can be made and the impact of these modifications once again observed. It is through the iterative cycle of design, observation, analysis, and redesign that one arrives at ontological innovations (diSessa & Cobb, 2004), which provide for the evolution and refinement of practice-oriented theory while also contributing to the design of innovative practices and tools.
DiSessa and Cobb (2004) define ontological innovation as “the invention of new scientific categories, specifically categories that do useful work in generating, selecting among, and assessing design alternatives.” (p. 78) As such, it is a theory that enables for attributions to be made about a phenomenon. These attributions allow for the phenomenon’s definition, clarification, and understanding. It, therefore, facilitates design decisions to be made with reference to the phenomenon’s relationship to learning. DiSessa and Cobb cite Lave and Wenger’s situated learning theory as an example of an ontological innovation (Lave & Wenger, 1991; Wenger, 1998). Ultimately, the aim of this study is to contribute to the development of ontological innovations relating to virtual mentoring and volunteer leadership development.

By examining the interplay among mentors, mentees, and the mentoring environment with respect to specified goals, this examination can lead to inferences about the effectiveness of the program design. Iterative design modifications to the embodied conjectures found within the mentoring program will shed light on what sorts of interaction and features can influence the attainment of leadership development goals. Given the degree to which the design affords interactions that further these goals, a statement about the robustness of the design can be made. The design is considered robust when it has contributed to program goals despite having been conducted under varying naturalistic conditions (Barab & Squire, 2004). Thus, the strength of design-based research is that it allows for the development of theory that has been tested in practice and can, thus, be said to provide guidance to practitioners (Barab & Squire, 2004; Brown, 1992).

Design-based research’s pragmatic orientation uses both qualitative and quantitative data collection and analysis methods to explore issues and to ascertain that relevant questions are being asked about process and effectiveness (Bell, 2004; Brown, 1992; Schoenfeld, 2006). Qualitative approaches allow for the exploration of how mentors and mentees interact within and with the mentoring environment. Such an approach can contribute to our understanding about what mentors and mentees do within the mentoring environment, and it can provide insights into how mentoring develops under the naturalistic conditions of a virtual mentoring program.
In a virtual mentoring program involving an asynchronous, text-based medium, interactions are recorded automatically. The environment, thus, enables the study of observable interactions in the form of artifacts. Therefore, the online environment affords the opportunity to triangulate what has been revealed in interviews with online discussions between a mentor and mentee. This triangulation would be difficult to observe in a traditional, face-to-face mentoring program because of the confidential and private nature of mentoring (Ritchie & Genoni, 1999), especially with regard to the development of leaders (Shenkman, 2008). Perceptions about mentoring benefits that lead to specific leadership development goals can be supported by data observed in online discussions, thereby grounding the findings in observed mentoring interactions.

1.8.1. Rationale and research questions

Perceptions about the mentoring environment and interactions can reveal salient program features that must be considered when designing mentoring programs. It is through the iterative study of mentors and mentees, within a specific mentoring environment, that theory can be developed to inform practitioners about how to design and implement mentoring environments, which support leadership development and succession within voluntary organizations. The design-based research orientation provides for the exploration of how mentoring perceptions and interactions influence the understanding of those involved within the program and whether the program contributes to a willingness to accept leadership roles.

The following research questions were addressed in this study:

1. What do mentees perceive to be important contributors to their understanding of leadership as they work through the program?
2. In what ways do mentors and mentees participate within a virtual mentoring leadership program?
3. What sorts of mentor-mentee attitudes, perceptions, and interactions influence the development of high-quality leadership mentoring relationships as perceived by mentors and mentees?
4. In what ways do mentors and mentees engage with the discussion material and mentoring environment?
5. To what extent do mentees feel prepared to take on leadership responsibilities?
6. Does the virtual mentoring program contribute to a willingness among mentees to accept leadership roles and tasks?
7. In what ways (if any) do mentors and mentees believe they have benefitted from participating in the program?
8. What are the salient issues that must be considered when designing and implementing similar programs?

The study was conducted with these questions in mind. They were explored as mentees worked through a leadership curriculum and discussed its implications for leadership with their mentors.

The program in which mentors and mentees took part was called Catholic Leadership Mentoring (CLM), and it was implemented in a Catholic voluntary, nonprofit organization. The findings provide insight on questions 1 to 4 and questions 7 to 8. Although data collected do not provide definitive conclusions to questions 5 and 6, anecdotal evidence shows that there may be potential for positive findings in terms of mentees’ feeling more prepared and willing to accept leadership responsibilities; thus, further exploration of these questions are warranted by the findings of this study.

Given that this study consists of questions nested within both a multiple case study approach and a design-based orientation, the reporting of this study’s findings has been structured to make salient those findings that relate to the cases as well as to make evident the implications of these findings for design. To clarify the structure of this thesis report, I provide the following table as an overview of the chapters to follow:
<table>
<thead>
<tr>
<th>Thesis Section</th>
<th>Chapter Title</th>
<th>Aims of the chapter</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review of literature from relevant fields</td>
<td>2: Literature review part i: Literature from relevant fields</td>
<td>• To highlight literature from relevant fields</td>
<td>• Method for conducting the literature search&lt;br&gt;• Summary and review of literature from relevant fields</td>
</tr>
<tr>
<td>Review of literature used to influence the design</td>
<td>3: Literature review part ii: Situating the design of the innovation</td>
<td>• To draw, from this literature, theories and concepts that can be used to design the</td>
<td>• Explanation of how I drew, from related literature, the influences for the design of the intervention and study</td>
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<tr>
<td>of the innovation</td>
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<td>research study and the virtual mentoring environment</td>
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<tr>
<td>Scope and Design of the Design-Based Intervention</td>
<td>4: Intervention Design</td>
<td>• To provide justification for decisions relating to the design of the intervention and study</td>
<td>• Decision on the context and scope of the intervention and study&lt;br&gt;• Description of the intervention and information on design decisions&lt;br&gt;• Description of the host organization</td>
</tr>
<tr>
<td>Case Study Approach</td>
<td>5: Research Design: Framework and Procedures</td>
<td>• To provide information on the research framework used to guide the implementation of the study</td>
<td>• Presentation and justification using a DBR orientation with a multiple case study approach&lt;br&gt;• Research procedures&lt;br&gt;• Ethical considerations</td>
</tr>
<tr>
<td>Case Study Approach</td>
<td>6: Preface for Individual Cases: Initial Findings and the Emergence of Case</td>
<td>• To provide detail and justification on the emergent procedures required to select cases to present in the thesis</td>
<td>• Description and rationale on how the three cases to be presented in the report were selected&lt;br&gt;• Explanation of how the selection procedures emerged from the initial analysis of all individual cases (as such relevant findings from the initial analysis are presented)</td>
</tr>
</tbody>
</table>
| Case study findings for individual cases | 7: Individual Case Descriptions and Themes | • To provide case descriptions and themes for three representative cases | • Description of the three cases representative of three emergent case groupings
• Themes for each case are developed |
| Findings from the cross-case analysis | 8: Cross-case Findings | • To provide cross-case findings based upon the analysis of all cases | • Findings from the cross-case analysis of all cases are provided |
| Findings that have an influence on the design of future interventions | 9: Considerations for the Future Design and Implementation of the CLM | • To provide findings related to design decisions, including those that arose during implementation | • Presentation of design issues that someone implementing such an intervention must consider |
| Discussion of findings from the case studies and the design-based research orientation | 10: Discussion | • To discuss the findings and how it relates to relevant literature
• To discuss how findings inform the development and implementation of future design-based research studies | • Discussion of the contribution of the study and its intervention to issues identified in the literature (theoretical and practical implications)
• Discussion of the limitations and constraints of the study and, consequently, the reading of the findings
• Recommendations for future research, including a discussion on the kinds of questions that could be explored |

Note. This table details the structure of the remaining chapters of this thesis report, from Chapter 2 until Chapter 10.
Chapter 2.

Literature Review Part I: Literature from Relevant Fields

2.1. Overview

A design-based orientation requires that the design of the learning innovation embody concepts that are theorized to afford processes and outcomes that the researcher is studying. Given these requirements, I conducted a literature review that not only situated the study within existing literature but that also informed the design of this innovation. In this case, the review was required to situate and inform the design of the virtual mentoring innovation, such that it could afford volunteer leadership development.

Aligned with these two goals, I have divided the literature review into two chapters. This chapter reviews literature from fields that provided context for and that informed this study. I begin the chapter by discussing the direction and method for conducting the literature review. Then, I present relevant literature in the following areas: 1) identified challenges of nonprofit and voluntary organizations; 2) relevant literature from leadership theory, leadership succession, and leadership development. In Chapter 3, I continue the review by presenting how I selected and synthesized the key design influences for the design of the innovation, or intervention, itself.

2.2. Literature Search: Direction and Method

According to the National Survey of Nonprofit and Voluntary Organizations (Hall et al., 2005), the nonprofit sector represents an amalgamation of societal issues and interests made manifest in the variety of its organizations’ missions. The effectiveness of
these organizations in achieving their missions can be positively informed by research in leadership theory, leadership development, and leadership succession. Within the intersection of these fields, however, lies an area that has not been well researched. An extensive literature search was conducted with the following purposes:

- To summarize and review the existing literature for virtual mentoring for leadership development within voluntary organizations
- To inform the design of the virtual mentoring innovation

A literature search was conducted, through Academic Search Premier, on various combinations of the following subject terms: “leadership”, “mentoring”, “voluntary organizations”, “leadership development”, “virtual mentoring”, “e-mentoring”, and “volunteers”. These searches uncovered no articles. When the search was conducted for any terms that appear in “all text”, articles were found. Only a few of these were relevant to the study. However, these studies provided a starting point for a broader search for literature in those fields most likely to provide context for the study and to provide theoretical and empirical guidance to the design of the virtual mentoring program. The search continued within the areas of a) nonprofit and voluntary organizations; b) leadership theory; c) leadership development; and d) leadership succession.

Searches in these respective areas were conducted via an examination of scholarly books, literature reviews, and the use of forward chaining to further literature. Empirical and theoretical works in peer-reviewed journals were reviewed. Traditional database searches were also conducted on specific theories or concepts such as “LMX”, “volunteers”, or “instruments” on an as needed basis. The decision to include reports and professional articles, when these were relevant to the above two search goals, was made because this literature could prove useful in providing an understanding of how virtual mentoring programs for volunteer leaders are perceived. These kinds of literature were particularly important with respect to areas such as volunteer leadership development and mentoring, where the research literature is scarce. Note that the majority of the literature reviewed is empirical. To clarify the kind of article that I have referenced, I explicitly state when I have cited theoretical or professional literature.
2.3. Literature: Nonprofit and Voluntary Organizations

Within the literature of nonprofit and voluntary organizations, two large-scale studies, one by Hall et al. (2005) and the other by Bugg and Dalhoff (2006), provide groundwork for future research on the nonprofit and voluntary sector in Canada. These studies are of particular relevance because they provide a description of and benchmarks for the Canadian sector, with the former being one of the most comprehensive studies of the nonprofit and voluntary sector conducted (Hall et al., 2000). These studies were conducted by consortia of researchers from among the nonprofit, public, or academic sectors.

In general, the literature on voluntary organizations found within academic journals tends to focus on sociological or theoretical perspectives that examine the civic and international role and influence of voluntary organizations, as opposed to investigating how organizations can be managed to reach their goals. Helmig, Jegers, and Lapsley (2004) reviewed the management research literature for nonprofits and concurred with this observation. However, Helmig et al. (2004) also note that research on how to manage nonprofits has recently emerged. Relevant literature within this sector includes pivotal research by Pearce (1980; 1982; 1993) and studies that have investigated the challenges associated with leadership succession within nonprofits or nonprofit leadership development. Table 2.1 provides a summary of these studies, their aims, and methodology. (All literature was published in peer-reviewed journals or books unless otherwise indicated.)
<table>
<thead>
<tr>
<th>Authors</th>
<th>Field</th>
<th>Aims</th>
<th>Methodology/Procedures</th>
</tr>
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</table>
| Hall, De Wit, Lasby, McIver, Evers, Johnston, et al. (2005)            | Nonprofit and Voluntary Sector       | • To collect data about the sector’s breadth, characteristics, and activity
• To identify challenges organizations have in developing the capacity needed to fulfill their missions | Phase i: Qualitative
• 36 focus groups (Canada-wide)
• 300 interviews with representatives from Canadian nonprofit organizations (registered charities and community groups) |
| Report for Canadian Centre for Philanthropy; Statistics Canada          |                                      |                                                                      | Phase ii: Quantitative
• 13 000 organizations completed the National Survey of Nonprofit and Voluntary Organizations (NSNVO) |
<table>
<thead>
<tr>
<th>Authors</th>
<th>Title</th>
<th>Objectives</th>
<th>Methodology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bugg and Dalhoff (2006)</td>
<td>Nonprofit Board Governance Practices</td>
<td>• To understand the environment in which nonprofits operate</td>
<td>Mixed method research</td>
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<tr>
<td></td>
<td></td>
<td>• To examine the state of nonprofit governance in Canada</td>
<td>• Conducted literature review to contextualize board governance practices</td>
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<td></td>
<td></td>
<td>• To identify successful board governance practices</td>
<td>• 1300 participants, across Canada, responded to an online survey</td>
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<td></td>
<td></td>
<td>• To explore key trends and challenges facing the boards of nonprofit and</td>
<td>• 37 participants in focus groups in either Toronto, Ottawa, or Halifax</td>
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<td></td>
<td></td>
<td>voluntary organizations</td>
<td>(Participants from Western Canada who could not personally attend focus</td>
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<td></td>
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<td>groups answered questionnaires)</td>
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<td>• 5 key informant interviews with experts on the field</td>
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<td>• Leadership commentaries from leaders in academia, governance, and</td>
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<td>voluntary nonprofits within Canada</td>
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<td></td>
<td>• Community roundtables with smaller nonprofit organizations held in</td>
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<td>Montreal and Edmonton (22 for each session)</td>
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<td></td>
<td></td>
<td></td>
<td>• Not representative of organizations with budgets under $100 000</td>
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<tr>
<td>Herman and Renz (2008)</td>
<td>Nonprofit Governance and Organizational Effectiveness</td>
<td>• To understand what is meant by nonprofit organizational effectiveness</td>
<td>• Conducted a literature review of recent research</td>
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<tr>
<td></td>
<td></td>
<td>• To identify whether the literature identifies best practices contributing</td>
<td>• Developed nine theses for nonprofit organizational effectiveness, using</td>
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<td></td>
<td></td>
<td>to nonprofit effectiveness</td>
<td>evidence from recent research</td>
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<td></td>
<td></td>
<td>• To build theory relating to volunteers’ (unpaid workers) experiences, intentions, and behaviour within organizations</td>
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<td></td>
<td></td>
<td>• To explore the implications of these findings for organizational behaviour</td>
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<td></td>
<td></td>
<td>Pearce (1980; 1982):</td>
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<td></td>
<td></td>
<td>• To study volunteer motivation</td>
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<td></td>
<td></td>
<td>Mixed method research</td>
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<tr>
<td></td>
<td></td>
<td>• Paid and unpaid organizations with similar missions were matched (7 matches were created)</td>
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<td></td>
<td></td>
<td>• Observational data collected from on-site visits</td>
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<td>• Interviews conducted in all participating organizations, stratified according to membership hierarchy</td>
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<td>• Questionnaires administered to all organizational members (response rate for unpaid members was 61%; response rate for paid members was 60%)</td>
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<td></td>
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<td>• Comprehensive literature review was conducted (Pearce, 1993)</td>
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<tr>
<td>Author(s)</td>
<td>Title</td>
<td>Methods</td>
<td>Findings</td>
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</table>
| Markham, Walters, and Bonjean (2001)          | Voluntary Organizations; Volunteer Leadership                        | Case study (using mixed methods)                                        | - Questionnaires administered to volunteer members and leaders in random sample of chapters, in the U.S and Canada, in 1974 (12 chapters) and 1992 (13 chapters)  
  - Semi-structured interviews with 12 chapter presidents and 12 presidents-elect  
  - Findings in the report emphasize 1992 study; Markham et al. state that the findings from 1975 are similar to the 1992 findings |
| Hailey (2006)                                  | Nongovernmental Organizations (NGO); Leadership Development          | Conducted a review of leadership theory and NGO leadership literature   | - To examine the role of NGO leaders and leadership theories to uncover challenges in designing NGO leadership development programs  
  - To identify practices contributing to effective leadership development  
  - To identify the competencies NGO leaders need to develop                                                                 |
2.3.1. Landscape of the nonprofit and voluntary sector

According to the NSNVO (Hall et al., 2005), the nonprofit sector is representative of issues and interests that Canadians uphold as being important to their lives. The level of citizen engagement within this sector is significant in terms of both human and financial capital. Hall et al. (2005) state,

Virtually all organizations are governed by boards of volunteer directors, which define the mission and objectives of these organizations. More than half of all organizations are run completely through the contributions of volunteers—in the form of donations of both time and money. Collectively, these organizations draw on more than 2 billion volunteer hours, the
equivalent of more than 1 million full-time jobs, and more than $8 billion in individual donations to provide their programs, services and products.... These findings suggest that one of the hallmarks of nonprofit and voluntary organizations is their connection to community through the participation of individual citizens. (p. 10)

It is my belief that comprehending why research must be conducted to assist voluntary organizations in their leadership development and succession efforts begins with recognizing the nonprofit and voluntary sector’s contribution to societal life. This also requires an understanding that the sector’s environment is substantially different from the for-profit contexts from which much of our knowledge about leadership development and succession is derived.

Hall et al. (2005) provide a breakdown of the major areas to which nonprofit organizations contribute. Sports and recreation organizations constitute the greatest number, at 21% of all organizations, within the nonprofit sector. Religious organizations are the second largest group, at 19%. Social service organizations follow at 12%. These are then followed by a category of organizations in grant-making, fundraising, and voluntarism promotion that represents 10% of the nonprofit sector in total. The arts and culture category and the development and housing category follow with 9% and 8% representation of all organizations, respectively. Other activities round out the sector. It is evident that these organizations reflect the wide variety of interests found within Canadian society at large.

Hall et al.’s (2005) study contributed to greater understanding of the landscape of the Canadian nonprofit sector as well as sector needs and challenges. However, the great variety in nonprofits’ missions and sizes reveals the need to investigate various sectoral segments in greater depth. For instance, it is likely that the challenges of a large sports-oriented nonprofit will be different from those of a local arts organization by scope and resources required.

2.3.2. Leadership challenges in the nonprofit and voluntary sector

Within the Canadian context, Hall et al. and Bugg and Dalhoff (2006) noted that voluntary organizations are experiencing difficulty with volunteer recruitment and
engagement; board member recruitment and commitment; funding; and strategic planning. Hall et al. state that almost half of all respondents to the NSNVO found it difficult to retain volunteers. Pressures to professionalize the nonprofit sector to compete for funds and to become better equipped to handle demands for increased accountability and transparency have exacerbated these problems (Bugg & Dalhoff, 2006). Based on this review, these pressures have affected the nonprofit sector in several countries, including Canada and the United Kingdom (Bugg & Dalhoff, 2006; Hall et al., 2005; Paton et al., 2007). I do not find it surprising that a majority of organizations reported concerns about meeting goals to provide their respective communities with services and programs, given both increased competition for funding and limited strategic planning. Increasing voluntary organizations’ capacity to become more effective requires human and social capital. Unfortunately, the NSNVO found that a significant proportion of organizations (39%) reports lacking the internal capacity needed to meet organizational demands and goals. Further, 38% are unable to provide training to those who volunteer for them (Hall et al., 2005), which is unfortunate because Pearce (1993), who studied volunteer behaviours and contrasted these with those of paid workers, has found that organizations that provide volunteer training do experience lower turnover than those that do not. While Bugg and Dalhoff found that board training was instituted by 73% of the organizations surveyed, 31% of these respondents found its quality poor, with only 22% rating it as good and 6% as excellent. While these findings do not necessarily extend to smaller organizations, which were not well represented in the board governance survey, one could argue that quality board training is likely to be an even greater challenge for smaller organizations with less resources to conduct such training.

I believe that exploring how voluntary organizations can make use of resources to meet their leadership and capacity needs must be better understood. Thus, in agreement with Bugg and Dalhoff (2006), I found it surprising, considering their capacity challenges, that boards were not as concerned about their organizations’ future viability and sustainability. Neither did boards seem concerned that issues regarding personal liability could present obstacles to the recruitment of volunteer board members. Bugg and Dalhoff also found that while boards were clearly concerned about leadership, few organizations had established processes for succession planning.
The persistent issue of leadership succession

To understand nonprofit leaders and volunteers, I turned to literature investigating their experiences. Within the voluntary organization literature, nonprofit leadership has long been studied from the perspective of what motivates members to lead and how this influences the leadership hierarchy within the organization. Within the voluntary and nonprofit context, Markham et al. (2001) state that leadership succession and selection practices are more informal than those observed within corporations or the public sector. In their review of this literature, Markham et al. (2001) discuss the three main perspectives—the democratic leadership model; the oligarchic leadership model; and the leadership-by-default model—for why members are motivated to take on leadership positions within voluntary organizations, prior to presenting a fourth perspective—leadership for self-development—that is based on their research.

Markham et al. describe the democratic leadership model as being a cultural ideal wherein members are envisaged as being motivated in their service by organizational goals; elected to leadership, at regular intervals, based on their ability and vision for fulfilling the requirements of the position; and active in decision making. Markham et al. also state that this is a model of leadership that is rarely achieved and, when implemented, has been inefficient and costly to organizations. Markham et al. explain that the more common characteristic of leadership within voluntary organizations is the reluctance of the general membership to participate in leading the organization, thereby leaving a few longstanding members to lead. The oligarchic model and the leadership-by-default model have been proposed to explain this phenomenon.

Markham et al. cite Michels’ (1911/2001) treatise, based on the latter’s analysis of the structure of European political parties, as being the foundation upon which the oligarchic model is based. According to Markham et al., scholars such as Hall (1999) and Brulle (2000) maintain that the oligarchic model is applicable to voluntary associations. Markham et al. further state that, within the oligarchic model, a leadership position is theorized as being attractive because of its related perquisites, such as prestige or even forms of remuneration, but also as being time consuming and requiring expertise that has developed with experience over time. Aligned with Michels’ thesis, Markham et al. explain that the skills, relationships, experience, and understanding that
a person needs to become a leader are necessary for the development of the organization, which gives leaders more control over the course of the organization. However, given that pursuing leadership is time consuming and requires that members acquire or possess skills and knowledge to participate in decision making, members prefer not to participate actively in directing the course of the organization. Instead, members transfer this responsibility to a few leaders, whose continued participation in the organization becomes indispensable. This lack of member participation is attributed to apathy (Michels, 1911/2001; Pearce, 1980; 1993), and leaders are viewed as guarding positions for themselves.

Markham et al. cite leadership by default as the third leadership model, based on Pearce’ study on voluntary organizations. In her mixed-method study, Pearce (1980, 1983, 1993) matched seven organizations, with paid workers, with their unpaid organizational counterparts. Pearce found that the perquisites that often accompany leadership, such as support to help accomplish goals or remuneration, did not exist. Given competing demands on their time, members were often unwilling to take on leadership roles, thus, leaving only the few who had the time; found leadership fulfilling in some way; or believed enough in the organization’s goals to shoulder the responsibility (Markham et al., 2001; Pearce, 1993). Pearce found that the voluntary organizations she had studied were characterized by small core groups assuming leadership, even when the core group members did not hold formal leadership titles. These core leaders were found to be responsible for a much larger group of peripheral members. While these leaders recognized that members had conferred upon them power to influence the direction of the organization, they preferred that others share in these leadership duties (Pearce, 1993). Rather than apathy, Pearce (1980) proposed that self-interest explains why volunteer members eschew leadership opportunities. Pearce (1993) argues that this phenomenon arises from the unpaid nature of volunteerism and the ambiguity of volunteers’ roles. The goal for these organizations must be to motivate members to assume leadership roles, even when these are ambiguous and time-consuming.

In a case study of a women’s community organization that lists training for community service and leadership as goals, Markham et al. found that a significant
percentage (38%) of members aspired to serve and found that 60% of members wanted to serve again. These members cited the opportunity to learn new skills as being their motivation for participating in leadership. Based on these findings, Markham et al. proposed leadership for self-development as an alternative to the previous three models found in the literature.

The model most closely aligned with the Canadian nonprofit and voluntary sector, given its challenge in recruiting volunteers and finding board members, is that of leadership by default, forwarded by Pearce. However, Markham et al.’s leadership for self-development indicates that some leaders might be motivated to participate in leadership because this provides them with an opportunity to learn new skills. The question of what voluntary leaders need to develop then comes to the fore.

2.3.3. Volunteer leaders: How do they lead and what do they need to learn?

Within voluntary organizations, Pearce found that referent power plays a prominent role in the conceptualization of leadership. French and Raven (1960), who theorized about the different bases of power, defined referent power as that which followers conferred upon leaders because the former liked or identified with these particular leaders, as opposed to their deferring to these leaders, because of hierarchical position. Paton et al. (2007) state that nonprofit leaders’ influence often does not stem from positions of authority. Pearce (1993) concurs and states that much of the influence that leaders have over members derives from interpersonal influence as opposed to position power. Within such an environment, leaders are better characterized as people who decide to be accountable for the completion of tasks and projects, in addition to influencing those things that organizational members believe to be important (Paton et al., 2007; Pearce, 1980, 1982, 1993). Yet, as seen from the literature, members of voluntary organizations often hesitate to take on leadership responsibilities, even though the opportunity to accept these roles exists (Bugg & Dalhoff, 2006; Hall et al., 2005; Pearce, 1980). Referent power within this context could be likened to that held by martyred leaders, who are admired by organizational members but who are often left with much of the workload within voluntary organizations (Pearce, 1993).
Given that leading in nonprofits is different from the contexts in which most leadership and leadership development literatures are developed, Hailey and James (2004) and Hailey (2006) recommend investigating the situations faced by nonprofit leaders, such that leadership development activities can be designed to meet these leaders' needs. Hailey and James argue that the organization's capacity to meet its goals is tied to the self-development of its leaders. Based on their review of empirical research into management practices and nonprofit organizational effectiveness, Herman and Renz (2008) state that evidence supports the argument that effective organizational governance is related to the success of nonprofits, where Renz (2010) defines governance as being the process by which organizational leadership is strategically provided. Yet, as previously explored, challenges do exist with respect to board management, especially in terms of board training and leadership development. Since boards are often viewed as the highest level of leadership in an organization, the lack of leadership development and training is likely to be even more pervasive at lower levels of the hierarchy.

Hailey and James note that leadership development activity has not been a focal point for organizations—a finding consistent with that observed within the Canadian context. Yet, Hailey and James' review of existing research into NGO leadership did reveal that NGO leaders were skilled in adapting to changing circumstance, balancing competing pressures, and innovating practices while maintaining personal integrity and organizational viability. Hailey (2006) found that context and culture influence the kind of leadership adopted and that the nonprofit environment is replete with conflicts of interest, internal conflicts, lack of financial resources, and high expectations with regard to what organizations can achieve.

Hailey and James (2004) state,

*Leadership is a tacit process. It is complex, dynamic, and highly personal. It is clear that effective leadership is contingent on the environment, culture, and context in which it is rooted. Leadership styles develop and evolve to suit the context and culture in which they operate. They cannot be simplistically transferred.* (pp. 350-351)
Leaders must learn to succeed within their organizations’ own complex environments and situations. This view links to those of Paton et al. (2007), who argue that nonprofit leadership development must move away from full-time, university-based nonprofit management education to part-time, blended leadership development, which takes advantage of learning technologies and the development of communities of practice in order to promote self-direction in leaders.

2.3.4. The current state of nonprofit leadership development

Hailey (2006) states that there has been little research in the nonprofit or public sector with respect to leadership development. Hailey’s review makes clear that the nonprofit leadership and leadership development literature must be better developed to help leaders meet challenges inherent to the situations they face, especially with respect to the leadership deficit with which the sector is challenged. He also states that the literature tends to concentrate on American nonprofits and on issues surrounding boards, as opposed to leadership, in general. However, Hailey’s review did reveal that South Asian nonprofits displayed a paternalistic leadership style in a hierarchical organizational structure. These nonprofits were also characterized by participatory management and dynamic relationships between leaders and followers. It is likely that studies can reveal differences in the ways that nonprofit leadership is manifested across cultures. In Canada, I previously noted that the foundation for research had been laid by Hall et al. and Bugg and Dalhoff; however, further research is clearly required, especially regarding the experiences of leaders as they steer their organizations towards goals.

Citing Day’s (2001) literature review of leadership development, Hailey argues that nonprofit leadership development goes beyond a single training intervention and that it represents a suite of activities designed to increase leadership capacity within an organization. Hailey lists a number of approaches to leadership development, cited within the literature, with these being coaching and mentoring; self-assessment questionnaires; psychometric testing; journal writing and narrative description; photographs and video diaries; cases and simulation exercises; specialist workshops and seminars; learning sets and peer group support; internships, attachment schemes, secondments, and observation exercises. Hailey asserts that leadership development
provide for personalized and flexible programmes that promote ongoing personal development. It is also important, as Hailey states, that leadership development programmes be evaluated for contributions made to leadership performance and organizational goals.

Based on my review of the literature relating to nonprofit and voluntary organizations; nonprofit leadership; and nonprofit leadership development, I believe that nonprofit and voluntary organizations must make leadership development and succession a priority, considering that an organization’s ability to meet its goals is influenced by the quality of its leadership (Bugg & Dalhoff, 2006; Day, 2001; Groves, 2007; Hailey & James, 2004). Fortunately, other sectors, such as government and business, have begun to take note of the challenges faced by voluntary organizations and are working to assist them in meeting organizational goals (Bugg & Dalhoff, 2006). Professional and leadership organizations are using their resources to contribute to the improvement of board practices (Bugg & Dalhoff, 2006).

While leadership and leadership development research and practices, originating outside the nonprofit and voluntary sector, can provide insights useful for developing volunteer leadership, a learning sciences perspective would argue that context does indeed play a role in how and what one learns about leadership. As such, research grounded in the nonprofit context would contribute to more effective development efforts. What may be applicable to leadership in one context may not apply to another. In this regard, the academic community has begun to conduct research within this area. It is in alignment with this call to research that the present study seeks to contribute (Bugg & Dalhoff, 2006).

2.4. Literature: Leadership Theory, Development, and Succession

It is my belief that a learning sciences and design-based research orientation can contribute to the systemic and situated study of volunteer leadership and nonprofit leadership development. Given the limited nonprofit literature available to inform the design of the mentoring environment, I examined the existing leadership theory,
leadership development, and leadership succession literatures developed in other contexts (such as the business and military sectors) in order to inform the design of the intervention. This literature is discussed in this section of the review.

Literature reviews conducted on leadership theory and leadership development (Brungardt, 1996; Day, 2001; Day and Halpin, 2001; Hailey; 2006; Stogdill 1948; Yukl, 1989); reviews of literature contextualizing studies (Abramson, 2007; Ardichvili & Manderscheid, 2008; Hailey & James, 2004; Holton and Lynham, 2000; Riggio, 2008; Siddiqi, 2001); and books on leadership (Northouse, 2007; 2013), leadership succession and development (Conger & Benjamin, 1999; Conger & Riggio, 2007; Friedman, 2011), and management (Ellis & Fisher, 1994; Mintzberg, 2004) were sought. Then, specific articles or books on particularly relevant topics were selected from these reviews for further study or clarification, including literature about situational approaches to conceptualizing leadership (examples include Hersey, 1984; Hersey & Blanchard, 1969, 1996; Reddin, 1967, 1970), leader-member exchange (examples include Dansereau, Graen, & Haga, 1975; Graen & Uhl-Bien, 1995), and relational perspectives on leadership (examples include Drath et al., 2008; Drath & Palus, 1994; Uhl-Bien, 2006).

2.4.1. The relationship between leadership and management

Modern leadership theories were principally developed in formal organizational contexts wherein leading was often conducted by those in official management positions. The nature of this relationship, between leadership and management, has provoked discussion among researchers and theorists. For instance, Mintzberg (2004) refers to leadership within the context of management, while Zaleznik (1989) views leadership as being conceptually different from management, requiring the selection of those with contrasting attitudes and competencies for each respective role. Zaleznik argues that being a manager is different from being a leader, in that a manager reconciles differences and seeks to limit options available to team members to achieve goals, while a leader is a risk taker who envisions and motivates others to move towards opportunity. Mintzberg (2004) rejects this view, explaining that “managers have to lead and leaders have to manage.” (p. 3) Thus, he uses the two terms interchangeably. Within the nonprofit leadership literature, Hailey (2006) discusses the differences
between management and leadership and shares the view espoused by Mintzberg. To overcome the scarcity of literature within the volunteer leadership field, I decided to treat management and leadership as equivalent and, thus, reviewed relevant management and leadership literatures.

2.4.2. Leadership theories and their implications for development

This section makes explicit the decision process that I used to make sense of the leadership theories I reviewed, in order to facilitate my selection of an appropriate theory upon which I could design the mentoring intervention. My review of the literature revealed that leadership theories varied but could be categorized according to several broad approaches. Table 2.2 presents various classifications, which have been used in various reviews of leadership theory.
<table>
<thead>
<tr>
<th>Authors</th>
<th>Field</th>
<th>Identified Classifications of Leadership Theories</th>
</tr>
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</table>
| Siddiqi (2001) | NGO Leadership; NGO Leadership Development | Cites Bryman’s 1992 classification:  
  • Trait  
  • Style  
  • Contingency  
  • New leadership approach (including charismatic leadership) |
| Abramson (2007) | Business Ethics; Leadership | Modern leadership theories:  
  • Trait theories  
  • Behavioural theories  
  • Situational leadership theories (contingency; path-goal; Reddin’s 3-D theory; Hershey and Blanchard’s Situational Leadership)  
  • Visionary leadership  
  • Ethical leadership  
  Archetypal theory (applied to leadership) |
| Northouse (2013) | Leadership Theory | Trait approach  
  Skills approach  
  Style approach  
  Situational approach  
  Contingency theory  
  Path-goal theory  
  Leader-member exchange theory  
  Transformational leadership  
  Servant leadership  
  Authentic leadership  
  Team leadership  
  Psychodynamic approach |
<table>
<thead>
<tr>
<th>Author</th>
<th>Leadership Theory; Management</th>
<th>Major Approaches:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yukl (1989)</td>
<td></td>
<td>• Power-influence approach</td>
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<td></td>
<td></td>
<td>• Behavior approach</td>
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<td></td>
<td></td>
<td>• Trait approach</td>
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<td></td>
<td></td>
<td>• Situational approach (path-goal theory; situational leadership theory; leader substitutes theory; normative decision theory; LPC contingency theory; LMX theory; cognitive resources theory; multiple linkage model; leader-environment-follower-interaction theory)</td>
</tr>
<tr>
<td></td>
<td>Newer trends:</td>
<td>• Transformational leadership</td>
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<td></td>
<td></td>
<td>• Charismatic leadership</td>
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<tr>
<td></td>
<td></td>
<td>• Yukl proposes an integrated conceptual framework (integration of theories)</td>
</tr>
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<td></td>
<td></td>
<td>• Trend towards shared process embedded in social systems</td>
</tr>
<tr>
<td>Brungardt (1996)</td>
<td>Leadership Development; Leadership Education</td>
<td>Trait approach</td>
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<td>Behavioural approach</td>
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<td>Situational approach</td>
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<td>Power-influence approach</td>
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<td>Transformational approach</td>
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<td></td>
<td></td>
<td>Efforts to integrate theories</td>
</tr>
<tr>
<td>Holton and Lynham (2000)</td>
<td>Leadership Development; Systems Theory; Organizational Performance</td>
<td>Cite Yukl (1989)'s classification:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Power-influence approach</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Managerial behaviour approach</td>
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<tr>
<td></td>
<td></td>
<td>• Trait approach</td>
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<td></td>
<td></td>
<td>• Situational approach (e.g. path-goal, situational leadership, contingency, LMX)</td>
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<tr>
<td></td>
<td></td>
<td>• Transformational or charismatic leadership</td>
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<td></td>
<td>Full-range of leadership model (Avolio, 1999; Bass, 1998)</td>
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<tr>
<td>Ardichvili and Manderscheid (2008)</td>
<td>Leadership Development</td>
<td>LMX</td>
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<td>Situational leadership</td>
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<td>Authentic leadership</td>
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<td></td>
<td></td>
<td>Complexity theory (as related to leadership)</td>
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Note. As opposed to the other literature that I reviewed, which was comprised of journal articles or books, Siddiqi (2001) is part of an international series of working papers, by the Centre for Civil Society, London School of Economics and Political Science.

While other categorizations could be developed that include other theories, I focus on discussing those sets of theories that were found to have influenced leadership development, as revealed by my review of the literature. Aligned with the need to select a leadership framework for this study, I categorized these sets of theories as leader-centric approaches, situational approaches, role influence approaches, and relational approaches to facilitate an understanding of the features shared by a set. In this section, I describe the approaches; identify their limitations; and discuss their implications for training and development.
**Leader-centric approaches**

Leader-centric approaches include research in which the leader is the principal focus. These approaches have explored the leader from the perspective of one who possesses fixed traits (e.g., introversion or extraversion), skills and competencies that can be developed (e.g., interpersonal skills; technical skills; knowledge), or particular styles of behaviour (e.g., relationship or task orientation). Northouse (2007) explains that trait approaches, such as early leadership theories referred to as *great man theories*, assume that certain people are born with traits that predispose them to leadership. This assumption can be heard in everyday speech when a person is called a *natural leader* (Ellis & Fisher, 1994).

The goal of the trait approach is to identify those qualities of leadership that enable the identification of future leaders. Stogdill's (1948) review of research within the field revealed that traits such as intelligence, attractiveness, status, and introversion-extraversion have been studied. More recently, a resurgence of trait leadership research among those studying the *Big Five* personality dimensions of extraversion, emotional stability, agreeableness, openness to experience, and conscientiousness has been observed (Barrick & Mount, 1991; Colbert, Judge, Choi, & Wang, 2012). Northouse (2013) cites research into the emotional intelligence of leaders, such as Caruso, Mayer, and Salovey's (2001) case study, as a continuation of the trait approach to leadership. A skills approach, on the other hand, assumes that leadership can be developed. Leadership skills that have been studied include problem solving and social judgement skills. Models, such as that of Mumford, Zaccaro, Harding, Jacobs, and Fleishman (2000), have been developed with respect to leader competencies and leadership outcomes.

According to Northouse (2007), the styles approach to leadership originated in studies conducted at Ohio State and the University of Michigan. In essence, these studies identified leadership styles based on the degree to which a leader was relationship-oriented or task-oriented. Blake and Mouton’s *Managerial Grid* (1985), which categorized the behavioural styles of leaders, was developed using the styles approach. Blake and Mouton (1985) identified five styles based upon relationship and task dimensions; these styles include what they refer to as country club management,
team management, organization man management, impoverished management, and authority-obedience. Although Blake and Mouton state that managers must be aware of other styles in addition to their own, because doing so would help managers to select the soundest style to employ, they paid little attention to the situational context in which the manager would be leading.

Limitations

Leader-centric approaches have been criticized for not taking into account the context of leadership. As pointed out by Northouse (2013), in reference to Stogdill (1948), the trait approach is useful to the extent that it provides for insight into leadership; however, leadership cannot be sufficiently understood solely from this perspective. Stogdill (1948) was one of the first to criticize the approach, in his review of the research investigating the traits of leaders, at that time. Stogdill argued that the effectiveness of these traits, in determining whether a leader would be successful, is situationally dependent; consequently, research should explore how situations influence leadership as opposed to focussing only on leaders’ attributes. Researchers such as Guion and Gottier (1965), whose review of existing literature criticized the validity of using personality tests for leadership selection, contributed to a decline in trait leadership research (Murphy & Dzieweczynski, 2005). Fiedler (1996) stated that the literature had revealed “no evidence for a specific leadership trait, behavior, or a leader personality” (p. 242), in his position paper on the future of leadership selection and training research. Renewed interest in trait leadership approaches, however, has prompted criticism from those who caution against its use for job selection. In their respective position papers, Morgeson et al. (2007) and Murphy and Dzieweczynski (2005) state that Guion and Gottier’s concern about the low validity associated with using personality inventories as predictors for job performance continues to be relevant.

Meanwhile, Northouse (2013) points out that research into the skills approach was often implemented within the armed forces. Thus, although the skills approach describes a complex set of leadership competencies, concerns exist that the skills revealed to be most important within military environments might not generalize to other contexts. With reference to the styles approach, Northouse (2013) and Yukl (2010) conclude that the relationship between styles and outcomes is inconclusive and can be
influenced by situational variables. Moreover, recommending a style to adopt is difficult without knowing how context influences the effectiveness of that particular style. These limitations suggest that one consider how leaders’ effectiveness is influenced by the situations in which they lead.

Implications for training and development

A trait approach to leadership, premised upon the idea that leaders are born and not made (Northouse, 2007; Ellis & Fisher, 1994), emphasizes leadership replacement strategies used when selecting new leaders (Northouse, 2013). Caruso et al. suggest that their Multifactor Emotional Intelligence Scale (MEIS) be used to assist in leadership selection. While Caruso et al. are pessimistic that emotional intelligence can be taught, they state that leadership development could prove useful in coaching leaders to recognize emotional and nonverbal signals to which they can then respond. Thus, by helping leaders to recognize these signals, role playing becomes an important strategy for training and development.

While leadership programs have incorporated skills as part of their training (Abramson, personal communication, March 6, 2015), many of these programs originate from approaches to leadership research other than the skills approach. For instance, situational approaches (which will be discussed in the next section) may discuss skills within their programs, but their orientations are not those of skills- or competency-based leadership models. Although few training programs based on the skills approach have been developed (Northouse, 2013), these programs could be designed to train leaders on new skills or coach them on a particular competency. Northouse states that leaders could use a skills inventory questionnaire to identify those competencies that they would like to develop. Similarly, leadership development is compatible with the styles approach, as exemplified by seminars provided by Blake and Mouton on their Managerial Grid (Northouse, 2013), during which leaders learn about leadership styles; identify their own; and explore how to move to a particular leadership style, such as one characterized by high task and high relationship dimensions. Conger and Benjamin (1999), whose well-cited book is based upon their multi-year study of leadership development in organizations, such as Federal Express and PepsiCo, stated that many leadership development programs have been influenced by leadership research from the
1950s and 1960s on how to manage small groups. In these programs, leaders learn about their particular styles of leadership by participating in sensitivity training, such as T-groups and encounter groups. This kind of training also became popular in use with situational approaches.

Within voluntary organizations (which, as mentioned, are often characterized by leadership by default), the pool of potential leaders is likely to be small. As such, a trait approach might have limited practicality due to the difficulty in being selective with respect to whom one chooses as a leader. In addition, it is difficult to identify what kinds of skills or styles would be appropriate for nonprofit leadership, given the limited understanding of nonprofit leadership that we have thus far. Therefore, the context in which leadership is expected to take place cannot be understood solely by referring to leader-centric approaches.

**Situational approaches**

Once it became clear that conceptualizing leadership required investigating situations (Northouse, 2013; Stogdill, 1948), research began to explore the contexts in which particular styles were most effective (Northouse, 2013; Abramson, 2007). Situational approaches include path-goal theory (House, 1971); Reddin’s (1967, 1970) 3-D theory of managerial effectiveness; Hersey and Blanchard’s (1969, 1996) life cycle theory of leadership, which was later renamed *Situational Leadership* (Hersey, 1984); and contingency theory (Fiedler, 1971).

In the path-goal theory of leader effectiveness, subordinates are motivated to perform a given task when a leader takes into account their motivations and selects a leadership style that increases these subordinates’ perception that their goals will be attained. In essence, the leader determines the goals by which a follower is motivated and, then, structures the environment, resources, or task to remove obstacles to the attainment of goals. Given the characteristics of subordinates, work setting, and task, the leader can choose among various styles; these are directive, supportive, achievement-oriented, or participative styles (House & Mitchell, 1975; Northouse, 2013). According to House (1971) and House and Mitchell (1975), path-goal theory builds upon expectancy theory in that followers are theorized to engage in a task relative to their
expectations about performing the task in relation to personal interests; pay-offs; and the
likelihood of attaining desired outcomes. House (1971) empirically tested path-goal
theory and found that it was able to reconcile conflicting evidence from previous studies
(such as the relationship between the leader's initiation of task structure and follower
satisfaction) and, thus, showed promise for future research. In his review of the theory's
development up to that point in time, House (1996) stated that the theory is a "dyadic
theory of supervision" (p. 325). House also stated that path-goal theory had contributed
to the emergence of other areas of research. Specifically, these areas include applying
path-goal theory to the work unit or investigating the emergence of value-based
leadership and charismatic leadership, which will be discussed in the section on role
influence approaches.

The next two situational approaches view the appropriateness of a leadership
style as being determined by the situational contexts in which these are used. Reddin's
(1967, 1970) 3-D theory of managerial effectiveness identifies various leadership
approaches and provides leaders with guidance on understanding the conditions in
which a particular approach will be perceived favourably by subordinates. Reddin based
his theory on his analysis of existing literature in the field of leadership research,
encompassing the areas of business; industry; and human relations. According to 3-D
theory, an approach is considered neutral until placed in a context where it is perceived
as being well or poorly matched to the situation. Moreover, Reddin’s theory provides for
the assessment of a leader’s ability to adjust to a given situation. Reddin refers to this as
style flex.

Hersey and Blanchard’s (1969, 1996) life cycle theory of leadership, now
Situational Leadership (Hersey, 1984), expanded upon Reddin’s 3-D and included
dimensions such as follower maturity and readiness (Hersey & Blanchard, 1969, 1996;
Northouse, 2013). They were also influenced by Blake and Mouton’s Managerial Grid
identify four styles appropriate to particular situations: telling or directing; persuading or
coaching; participating or supporting; and delegating. Both Reddin and Hersey and
Blanchard theorize about the intersection of task and relationship orientations in relation
to a particular situation, and they stress that the leader apply the appropriate approach to that situation. Hersey and Blanchard’s model remains popular (Abramson, 2007).

Whereas other situational approaches prescribed how a manager must work within a situation to influence followers’ behaviour, contingency theory (Fiedler, 1971) operationalized leadership style and the favourableness of the situation in order to match the style to the situation. Fiedler (1971) operationalized leadership style by having leaders rate their least preferred coworker (LPC) on measures such as their friendliness or level of cooperation. Those with high LPC scores tended to score their least preferred coworkers favourably, while those who had low LPC scores tended to rate their coworkers negatively. Those with high LPC scores were theorized as placing less priority on task and, therefore, being relationship-oriented. Conversely, those with low LPC scores reflect a task-orientation. Situational favourableness involves the dimensions of leader-member relations, task structure, and power position in the original model. Fiedler’s (1971) review of field and laboratory studies that tested contingency theory revealed that the most important situational factor among the three dimensions is leader-member relations. Fiedler’s review also provides support for the conceptualization of situational favourableness as moderating the relationship between leadership style and leadership effectiveness, which is defined in terms of group performance. Findings also provide evidence that low LPC leaders are most effective in extremely favourable or unfavourable situations, while high LPC leaders perform better in situations of intermediate favourableness.

Limitations

In his review of the history of path-goal theory, House (1996) stated that the theory required further testing but that doing so would require developing measures that more accurately reflect its constructs. In addition, House stated that solutions to methodological issues regarding controls were needed. In an article revisiting their situational leadership theory, Hersey and Blanchard (1996) stated that the model required another dimension involving the assessment of job requirements. They also believed that their notions of follower maturity were not aligned with a newer conception of leadership, which is akin to something that is done “with people, not to people.” (p. 44) Moreover, Northouse (2007) states that Hersey and Blanchard’s constructs have not
often been studied empirically. He calls into question the theory’s prescriptions for the styles that should be matched to situations. On the other hand, based on Fiedler’s 1971 review of studies conducted on contingency theory, the contingency model was found to bear out in field studies, though not in laboratory studies. According to Northouse (2007), contingency theory has been supported by empirical research, but it has been criticized for not providing satisfactory insight into why leaders are effective in particular situations. Abramson (2007) states that situational approaches have been criticized because these overemphasize the influence of the situation and de-emphasize the influence of the leader in shaping situations. Moreover, Abramson (2007) writes, “If leadership effectiveness depended solely on performance results, then the ends justified the means. Any leadership style, no matter how negative for followers, was deemed to be effective if the leader achieved the output requirements.” (p. 117).

**Implications for training and development**

Situational leadership approaches, with the exception of contingency theory, would train the leader to understand under what circumstances a particular leadership style should be applied. According to Northouse (2007), Hersey and Blanchard’s *Situational Leadership* is considered a standard for leadership training. Conger and Benjamin (1999) cite Hersey and Blanchard’s small-group seminar as being one that best exemplifies short leadership training courses conducted by training companies. Typically, an instrument is administered to provide participants with an assessment of their leadership, prompting self-examination. The participants then learn about the leadership model and role-play situations as prescribed by theory. I believe the success of Hersey and Blanchard’s model relates to its intuitive appeal and its heuristic value for guiding leaders in practice.

As opposed to the other theories, wherein leaders can act upon the situation based upon the prescriptions of a model, contingency theory is descriptive. It informs the leader whether his particular style is suitable to a condition. Therefore, it is most applicable in determining which leaders match a particular situation (Northouse, 2007). In this respect, contingency theory tends to be better aligned with leadership selection for positions in which a job or project description has been identified.
Situational approaches assume the existence of leaders and followers working on a task. Within the context of developing leadership capacity in voluntary organizations, these theories could shed light on the kind of leadership required to perform a task. However, these approaches are limited in their utility in guiding the design of a virtual mentoring environment for volunteer leadership. This is especially the case when one does not yet know the kinds of situations that will be faced or discussed within this particular online context.

Role influence approaches

I categorize the next group of theories as role influence approaches because they focus on the leader’s role in influencing their members; these are visionary, charismatic, transformational, ethical, servant, and authentic models of leadership. Specifically, these approaches provide insights or guidance into how a leader develops a vision or models a way of being that motivates others to adopt and build a particular organizational culture. These approaches can be divided into two groups. The first group involves strategies associated with a charismatic model of leadership, including the development of a vision that transforms and motivates organizational members. I view the second group of approaches as providing guidance on how leaders can employ restraint in their use of power when influencing members. These theories recommend that this be done by holding leaders accountable to ethical standards; promoting altruism in their actions; or maintaining transparency in the organizational culture. I have placed transformational leadership within the first group because this theory is closely related to the motivating of members beyond their own interests toward those of the group. However, transformational leadership could also have been placed in the second group because Burns (1978) viewed a transformational relationship as having a moral component, by which the relationship between the leader and follower leads to their elevated morality.

Building and motivating toward a vision

According to Abramson (2007), visionary leadership provided an alternative to situational approaches because the leader was not only responding to the elements of the situation but defined the desired situation toward which the organization would move.
Westley and Mintzberg (1989), who analyzed the biographies of leaders whom others had described as visionary, found that leadership styles varied among visionary leaders. They found that leaders not only shaped but were also influenced by events and interactions within these situations. Charismatic leadership, which is closely related to visionary leadership, has been described by Jacobsen and House (2001) as involving the interactions among the leader, groups who could offer support for the leader’s vision, and the social context in which they interact. Jacobsen and House developed a simulation to test the charismatic leadership model. They found that their model fit the profiles of six charismatic leaders, including John F. Kennedy and Adolf Hitler.

Transformational leadership has been widely studied since the 1980s (Northouse, 2007) and involves a form of leadership relationship in which followers are motivated to accomplish more than what would be expected from a transactional relationship, wherein one does only what one is expected to do. Northouse states that this interest can be traced to Burns’ conceptualization of transforming leadership, which became influential within leadership studies. Burns (1978), using political analysis, theorized that the power to influence in leadership lies within the relationship between leaders and followers, and he stated that power is a collective act, shared by the leaders and followers because it involves the intentions of all. Transformational leadership theories include those based on research by Bass (1996), Kouzes and Posner (2007), and Bennis and Nanus (2007). According to Northouse (2007) and Shamir, House, and Arthur (1993), it is often associated with visionary and charismatic leadership.

Maintaining ethics and values in leadership

As seen from the above section, morality and ethics began to receive attention from the leadership field. While Burns assumed that transformational leadership would elevate both leader and follower, one could argue that a charismatic leader, such as Adolf Hitler, could have developed relationships with followers that engendered commitment above what was expected from them and that led to their having committed atrocities. As noted by Abramson (2007), if situational leadership involves assessing a leader’s effectiveness in reaching goals, the attainment of these outcomes might override the ethical means for attaining them. In addition, Grojean, Resick, Dickson, and Smith (2004), in their theoretical position paper examining how leaders can create an
ethical organizational climate, argued that ethical leadership was required, given the corporate scandals that had been witnessed during that period. According to Grojean et al., leadership must not only lead to productivity and the achievement of financial goals but also to providing organizational standards and values that guide members actions toward ethical and moral processes and ends. Moreover, they argue that leaders must model this behaviour for their members and, in this way, contribute to an ethical organizational climate.

In servant leadership, which is based upon the experiences and writing of Robert Greenleaf (1970), leaders place the needs and growth of followers before their own. According to Northouse (2013) and Spears (2002), servant leadership has been praised by many leadership researchers and thinkers for being the kind of leadership that would be found within an ideal organization, and it has been adopted by several corporations as their guiding philosophy. It provides a guide for conducting oneself as an ethical leader. Spears (2002) examined the development of servant leadership and found that the theory emphasizes that the servant leader model behaviours such as listening, empathy, healing, awareness, persuasion, conceptualization, foresight, stewardship, committing to the growth of people, and building community. Abramson (2007), in his archetypal analysis of God as leader, recommends that leaders must be reliable and trustworthy on a consistent basis. Moreover, they must expect that their followers may not always act in a reciprocal fashion and that they must, as leaders, be willing to suffer for their followers and model ethical behaviour. In so doing, followers who begin to model their actions after their leaders learn to become ethical leaders, themselves.

Like servant leadership, authentic leadership provides a philosophy and model for how one should lead an organization. Walumbwa, Avolio, Gardner, Wernsing, and Peterson (2008), who tested an instrument they had developed for authentic leadership, state that authentic leadership presents a form of leading that responds to the need for greater accountability and positive organizational outcomes. Citing Deci and Ryan’s research into self-determination and the internalization of values, Walumbwa et al. (2008) suggest that when leaders come to understand their motivations, strengths, and weaknesses, they can model this process and help their followers to do the same. By being transparent with others, leaders show that they are authentic in their quest to
understand themselves better in order to serve others better. In remaining authentic, it is theorized that leaders win the trust, credibility, and respect of their followers. The organization, as a whole, moves toward well being by encouraging organizational members to develop authentic relationships. Yet, Abramson and Senyshyn (2010), who used Bultmann’s de-mythologizing hermeneutical method (Johnson, 1991) and Badaracco’s (2006) method for analyzing literature (the Abraham Story) to gain insights on leadership behaviour, explained that an authentic leader may hold values that may not conform to those of the organization. The leader’s enactment of these values may be disruptive to organizational behaviour. However, Abramson and Senyshyn also contend that if this leader is committed to altruism, the leader may, paradoxically, be an ethical and effective interpersonal leader.

Limitations

Visionary, charismatic, and transformational leadership have been criticized for not having conceptual clarity, according to Northouse. In addition, these theories tend not to explore the follower’s role in the development of an organizational vision. Although transformational leadership is contextualized within a relationship, the theory tends to focus on how the leader influences the follower, as opposed to how both the leader and follower influence each other in the relationship.

Ethical leadership, servant leadership, and authentic leadership touch upon the importance of ethics in leadership and provide guidance on how to lead within organizations. However, these approaches could be described as philosophies of how to lead rather than as theoretical models of leadership. Despite being used in practice for several years, servant leadership is a new area of research within leadership (Northouse, 2013). Authentic leadership is at an even earlier stage of development than is servant leadership (Northouse, 2013). Clearer conceptualization of the theories’ constructs and more empirical research are required to investigate and develop both approaches. More fundamentally, one might criticize these approaches based on assumptions that they hold about the nature of ethical organizations; for instance, the philosophical relationships among ethics, altruism, and authenticity in leadership need clarification.
Implications for training and development

Training programs influenced by visionary, charismatic, and transformational leadership focus on acquiring the skills needed to develop and implement a vision within an organization (Northouse, 2013). In addition, leaders are assessed on a variety of leadership attributes and provided with feedback on how they lead. Leaders also learn about different types of leadership relationships, from transactional to transformational. Northouse (2013) states, however, that these programs have been criticized because visionary and charismatic leaders tend to be viewed as possessing trait-like characteristics that cannot be easily learned.

Ethical leadership has implications for leader selection and leadership development. In his critique of management education, Mintzberg (2004) states that one of the reasons ethical leaders cannot be developed solely through a theoretical and technical education is that such education removes them from the consequences of leadership practice on organizational and social outcomes. He promotes learning in the context of practice, coupled with reflection on experience.

Research on ethical leadership has also provided insights on how to develop ethical leaders. In their study of the trickle-down effect of ethical leadership in American organizations, Mayer, Kuenzi, Greenbaum, Bardes, and Salvador (2009) found that executive- and supervisory-level behaviours positively relate to organizational citizenship, while both levels of management behaviours negatively relate to group-level deviance, with supervisory levels mediating the influence of executive management on outcomes. These findings suggest that supervisors must be trained on the values of the organization. Grojean et al. (2004) state that a strong and consistent ethical organizational climate is developed when leadership training involves learning how to identify and respond to ethical situations that arise. They state that leaders must be responsible for mentoring leaders below them in the hierarchy about the ethical values of the organization. Johnson (2007) places emphasis on self-reflection, with development focused on character building through role modelling and storytelling. He also suggests providing leaders with leadership passages, which are significant events that leaders must experience. An example of a leadership passage would be placing a leader in a challenging work situation.
Grojean et al. state that ethical leadership has implications for human resource recruitment and selection. The fit of the person to the organizational culture will help attract and keep those who are most likely to fit within the organization. In a similar way, servant leadership (Greenleaf, 1970) has implications for selecting leaders who lead as servant-leaders as well as for training leaders how to serve others within their personal and work lives. With authentic leadership, leaders focus on understanding critical events in their own lives through the construction of life-stories, which enables these leaders to learn more about themselves and their values (Shamir & Eilam, 2005). Shamir and Eilam encourage guided reflection and the sharing of life-stories.

Within the context of virtual mentoring, role influence approaches could provide content to be discussed by mentors and mentees. However, these approaches lend themselves less readily to the nonprofit challenge of leadership succession. These theories tend to describe how one can lead the organization toward a vision or provide guidance on how one should behave as a leader, as opposed to how to motivate members to become leaders.

**Relational approaches**

Burns (1978) discussed transformational leadership within the context of relationship. Relational approaches expanded upon this idea by making the relationship, itself, the unit of study (Graen & Uhl-Bien, 1995). In her review of relational approaches, Uhl-Bien (2006) separates relational approaches into two groups; the first includes *entity perspectives* and the second includes *relational perspectives*.

According to Uhl-Bien, entity perspectives focus on the individual cognitions and perceptions of the leader and the member. These perspectives explore how individuals, leaders or members, perceive and conceive of themselves in relation to others. The basic unit of study is the relationship, as it is conceived by each of its member. Leadership is viewed in terms of how leaders align themselves with members in order to influence the latter to work toward a goal. Entity perspectives are based upon realist ontology and, therefore, perceptions and cognitions are studied as constructs to understand how relationships form in order to effect positive forms of leadership, with the goal of generalizing to similar situations.
The principal entity approach is leader-member exchange (LMX) theory, which originated in the empirical investigation of the dyadic vertical relationship between a leader and a follower. LMX has evolved to explore the relationships between leaders and each of their individual members (Dansereau, Graen, & Haga, 1975; Graen & Cashman, 1975; Graen & Uhl-Bien, 1995). In contrast to situational approaches, which focus on a leader’s interactions with a group of followers, bound within the context of a particular situation, LMX theory focuses the attention of research squarely on the one-to-one relationship between a leader and a follower. The leader may have many followers in his group, but each relationship with a follower represents its own bounded unit of analysis. Depending on the quality of the relationship a leader has with a specific follower, the nature of the leadership relationship may be different. Thus, some relationships will belong to the leader’s out-group and others will belong to the in-group. Whereas path-goal theory speaks of dyadic supervision (House, 1996), where the kind of dyadic supervision required is informed by the situation (e.g., the ambiguity of the task), LMX speaks of dyadic relationship, which centres on the nature of the leader-member relationship (i.e., relationship quality). The main thrust of LMX is that when leaders form high-quality, one-to-one relationships with each of their followers, the leader-member relationship progresses toward transformational leadership, with its accompanying positive outcomes. This progression encompasses phases of being strangers, being transactional, and being transformational in relationships. LMX is a descriptive theory that has been supported by evidence from empirical research (Northouse, 2013). LMX research has now begun to shift toward investigating how these relationships are networked throughout an organization (Graen & Uhl-Bien, 1995; Uhl-Bien, 2006).

More recently, several approaches have based their conceptualizations of leadership upon a social constructionist ontology (Uhl-Bien, 2006). As such, knowledge about social realities is constructed within a relational context among persons within a system (Uhl-Bien, 2006). Relational perspectives view leadership as an emergent process or, sometimes, outcome (Drath et al., 2008), meaning that leadership is co-constructed and negotiated among the interrelationships of the people and practices involved in it. In so doing, the shape that leadership takes is dependent upon the environment in which it develops, and its meaning is subject to change and negotiation.
as the distributed relationships in the environment also change. Moreover, the conception of leadership, itself, is situated and, thus, can only be understood within this particular context. The term relational, from this perspective, does not refer to the interpersonal relationship between a leader and a follower, as in entity theory. Rather, relational refers to the meaning-making and participatory processes engaged by those within an organization. Leadership is, therefore, not defined in terms of a particular action taken or a responsibility held by a person in the role of a leader with respect to followers, as in entity theories and other leadership theories already discussed. Instead, leadership is conceived as being constructed and coordinated through the ordering processes that occur within the system. This perspective is influenced by concepts from complexity theory, organizational learning, and communities of practice.

Leadership shifts from being viewed as the social influence that a leader initiates, whether it be unilateral or reciprocal, in order to effect behaviour in followers toward the attainment of a goal (as defined in Northouse’s definition of leadership in Chapter 1) to being viewed as a negotiated property of the interactions distributed across a relational system (Drath et al., 2008; Drath & Palus, 1994; Hosking, 1988; Uhl-Bien, 2006). Uhl-Bien (2006) states,

In sum, entity perspectives approach relational leadership from the standpoint of relationships lying in individual perceptions, cognitions (e.g., self-concept), attributes, and behaviors (e.g., social influence, social exchange). They view leadership as an influence relationship in which individuals align with one another to accomplish mutual (and organizational) goals.... Moreover, they have primarily focused on leadership as manager-subordinate exchanges under the condition of already “being organized” (Hosking & Morley, 1988).... In contrast to entity approaches, relational perspectives (Hosking et al., 1995) see leadership as a fundamentally social-relational process of organizational design and change (Dachler, 1992).... Relational perspectives...view organizations as elaborate relational networks of changing persons, moving forward together through space and time, in a complex interplay of effects between individual organizational members and the system into which they enter (Abell & Simons, 2000; cf., Sayles, 1964). In this way, organizations change as a result of the “co-ordination” of people’s language and actions in relation to each other at all levels and to the ever-changing larger socioeconomic environment (Abell & Simons, 2000). Moreover, power is not a commodity, concentrated within certain individuals, but is distributed throughout the social field (Foucault, 1977).... It sees an appointed leader as one voice among many in a larger
coordinated social process (Hosking in press).... Whereas entity approaches focus their attention on the quality and type of interpersonal relationships that occur among interacting individuals and groups, relational perspectives emphasize the relational (i.e., “in relation to”)—they view multiple realities of self and other as coevolving, or constructed “in relation” (Hosking, in press). (pp. 661-662)

In this way, the relational perspective fundamentally changes the way leadership is conceived and, hence, what and how it is studied. Leadership need not be confined to what leaders do. Rather, questions as to the nature of leadership within a particular context can also be studied.

Limitations

As the main entity relational theory, LMX has been praised for being descriptive and prescriptive, but it has been criticized for not being able to explain how members of a dyad relate to each other to develop what are perceived as high-quality relationships (Northouse, 2013; Uhl-Bien, 2006). On the other hand, relational perspectives, while they prompt new questions about leadership, can be criticized because what can be defined as leadership is unclear (Drath et al., 2008; Uhl-Bien, 2006). It is necessary to make explicit what constitutes the bounds of leadership in the variety of situations being studied. Relational perspectives are compatible with studying leadership in flatter organizations or in groups in which leadership is emergent, shared, or distributed.

Implications for training and development

From the entity perspective, Northouse states that LMX does provide managers with evidence recommending that they develop high-quality relationships with their individual members. However, practitioners have not readily adopted the LMX approach as a guide for developing leadership training programs (Northouse, 2013). Prior to the theory’s being used for training, Graen and Uhl-Bien (1995) proposed a program of research, which could lead to the identification of variables that could eventually inform the design of such programs. Relational approaches, encompassing both entity and relational perspectives, could be used to sensitize leaders and members to the way they perceive and relate to other people. Programs could involve members and leaders...
reflecting upon their espoused theories and their theories-in-use with respect to leading and building relationships (Argyris & Schön, 1974; 1996).

From a learning perspective, I would classify some relational perspectives, specifically those of Drath and Palus (1994) and Drath et al. (2008), as being influenced by situated learning theory (Cook & Brown, 1999; Lave & Wenger, 1991). These perspectives are influenced by the concept of communities of practice (Lave & Wenger, 1991; Wenger, 1998), such that leading is constructed and situated in its practice within a particular organizational community. Drath and Palus (1994), in their theoretical position paper, state that leadership development could be used to improve all members’ ability to participate in the leadership process, thereby becoming more engaged in the social meaning-making process of leadership. Apprenticeships (Lave & Wenger, 1991), role modelling (Lave & Wenger, 1991), action learning (Conger & Benjamin, 1991), and mentoring become more important within this context.

**Distinguishing between leader development and leadership development**

Because relational perspectives view leadership as distributed and negotiated across the entire organization, a distinction is made between leader development and leadership development (Uhl-Bien, 2006). Since researchers forwarding relational perspectives do not view leadership in terms of how leaders influence members but with respect to participation and meaning-making in the leadership process, they distinguish between leadership development and leader development. Leadership development is viewed as developing the organization’s capacity to lead (based on the meaning of leadership, in terms of participation and location, that has been constructed within the organization; e.g., increased participation of volunteers in general meetings), while leader development is tied to an individual’s learning (e.g., knowing when to be a benevolent autocrat).

This shift in perspective toward *leadership development* from *leader development* appears in the leadership development and succession literature. In his review of the leadership development literature, Day (2001) argued that leadership development efforts must develop strategies for increasing the organization’s leadership capacity, instead of aiming solely to develop individual leaders. This social constructionist
perspective has had influence in the leadership development literature. Indeed, Riggio (2008), in his review of the leadership development literature, states that Day’s (2001) argument in favour of the prioritization of leadership development over leader development has been repeatedly cited within this field.

**Defining relational approaches to leadership**

Uhl-Bien proposed a definition for leadership that encompasses both entity and relational perspectives. Uhl-Bien (2006) defines relational leadership as the following:

[A] social influence process through which emergent coordination (i.e., evolving social order) and change (i.e., new values, attitudes, approaches, behaviors, ideologies, etc.) are constructed and produced. This definition should be applicable to both entity and relational perspectives, since relating is a dynamic social process that can be seen as acts of individuals (operating in a context) or as social constructions of interacting relationships and contexts… (p. 668)

This definition is also compatible with that proposed by Northouse (2007) in which he defined leadership as a social influence process leading to the accomplishment of a common goal, although the relational leadership definition would define that common goal and the processes for attaining it as being constructed. The design of a virtual mentoring program for a voluntary organization could be appropriately informed by this proposed definition, because the conception of leadership is not tied to the actions of a leader and member within the context of a formal supervisory relationship. Rather, this definition assumes that leadership emerges as a social process, which includes developing members for leadership and increasing organizational capacity—two needs identified within the nonprofit and voluntary organization literature.

**2.4.3. The relationship between leadership theory and leadership development**

At present, all four categories of leadership approaches (leader-centric approaches; situational approaches; role influence approaches; and relational approaches) are still utilized in research and practice. While the above review appears to demonstrate a one-to-one correspondence between the development of leadership theory and that of leadership development, each field of study has its own historical
trajectory. In fact, Brungardt (1996) stated that leadership development had not been an area of scholarly study until a few years before the writing of his article, in which he referred to leadership development as a “new field... in its infancy.” (p. 83) While the leadership development literature has been influenced by leadership theory, it remains to be seen whether leadership development might empirically shed light upon leadership, itself. The probability of a reciprocal influence existing between leadership development and leadership theory has become more likely as the influence of theories from organizational learning (Brown & Duguid, 2002; Lave & Wenger, 1991) have come to influence leadership development. This, in turn, has provided a relational lens by which to view leadership (Drath & Palus, 1994).

2.4.4. Leadership Succession

In general, leadership succession involves the development of processes for identifying, preparing, and selecting members of an organization to assume leadership positions (Friedman, 1986). Articles and books selected for this review of the leadership succession literature were included because these also provided insights on leadership development (Conger & Riggio, 2007; Day, 2001; Friedman, 2011; Groves, 2007). In his prologue for a special issue on leadership succession, Friedman (1986) stated that the field now viewed leadership succession as necessary, within the increasingly complex environment of organizations. This perspective is unlike the opinion of many from the decade preceding that issue. In 2011, Friedman stated that the topics that had been discussed in that 1986 special issue continued to remain current and relevant to the field.

Friedman (1986b) defined succession systems as “the rules and procedures that form the context for a typical succession event” (p. 2), whereas an event is “a change in job incumbency.” (Friedman, 1986b, p. 2) A succession system also includes leadership development and practices for the placement of leaders. Succession process, as defined by Friedman (1986, 1986b), involves how critical decisions about succession are made. Friedman (1986b) investigated the relationships between succession systems and the outcomes of corporate reputation and financial performance, by surveying key informants from 235 firms. Some of Friedman’s findings included a positive association
between performance and measures of CEO involvement, the scanning for future organizational leadership needs, and the use of job placements for executive development. In his study, Friedman (1986b) found that internal hiring for leadership positions was important, given that insider status and loyalty positively and significantly correlated with organizational performance. Based on his research, Friedman argued for the development of succession systems, shifting the focus from succession events, such as hiring a candidate for a particular position, to that of process, such as the development and implementation of strategies for identifying; developing; and selecting leaders within an organization.

Friedman (1986b) proposed that executive development was critical to the organization and that providing leaders with opportunities to work in new positions was, in fact, linked to their learning about leadership. This assertion was supported by Hall (1986) in his position paper linking succession planning and executive learning. Hall (1986) argued,

[O]rganizations will have to broaden their definitions of executive learning. Personal learning (attitudes and identity) will be at least as important as new task skills for performance and adaptability development. By giving the individual executive more responsibility for his or her own learning and career, by stressing more behavioral learning, and by creating less selective, more developmental learning environments throughout the organization, the growth of both the individual and the organization can be enhanced.

Executive learning should be facilitated through learning environments, not just through discrete, time bounded experiences such as executive development programs.... This executive learning will have to be tied in more to an ongoing process of strategic succession planning to replace key executives, as opposed to one-shot staffing or replacement planning. (p. 72-72)

Whereas leadership development, in 1986, referred to the development of executive leadership, Friedman (2011) states that today’s organizations, in general, believe in the systematic development of future leaders and that leadership can be developed by members at all levels of the organization. Day’s (2001) review of existing leadership development literature, Day and Harrison’s (2007) position paper forwarding an integrated leadership development system, and Groves’ (2007) empirical research
into leadership development and succession practices support Hall’s (1986) and Friedman’s (1986b) respective recommendations. This literature also aligns with relational perspectives of leadership.

In addition to leader development efforts that build human capital, leadership initiatives must aim for the growth in social capital that forms the foundation for leadership development, according to Day (2001). Day states that the development of this organizational leadership capacity is less dependent upon the implementation of particular types of intervention, such as mentoring or 360-degree feedback. Rather, it is more dependent upon organizational support for the systemic development of leaders, at all of the organization’s levels, and upon how well these efforts are linked to the organization’s mission and goals. As such, Day recommends that these goals be achieved through comprehensive development efforts. This particular perspective is supported by several researchers, including the aforementioned Day (2001); Day and Halpin (2001); Groves (2007); and Riggio (2008). Canavan (2001), who conducted a literature review on leadership succession and developed a systems framework to guide leadership succession within Catholic schools, also drew similar conclusions. In effect, Prewitt (2003), who reviewed leadership development as it relates to Senge’s (1990) influential work on learning organizations; Riggio; and Canavan call for organizational culture to be developed by utilizing complementary interventions and practices to promote a learning culture, which in turn encourages the ownership of organizational goals across all levels of the organization.

Evidence to support this view can be seen in Groves’ (2007) findings, based on his content analysis of 30 healthcare industry executives’ interviews, from 15 sector organizations renowned for the quality of their practices. His findings revealed that these organizations integrated their leadership development and succession planning efforts. Further, these organizations established strong, internal mentoring cultures; identified and assessed the talents of high-potential employees; provided for the recognition of high-potential employees’ efforts; assigned high-potential employees to leadership development initiatives that allowed them to apply and expand their leadership skills; offered leadership development training courses; and reinforced an “Organizational Culture of Leadership Development.” (Groves, 2007, p. 244)
As explained by Barnett and Davis (2008), who conducted a literature review of best practices within the leadership succession field, comprehensive succession planning attempts to develop the infrastructure needed to identify and understand the contributions of potential leaders to the organization while also promoting leadership development activities for them. Barnett and Davis conceptualize leadership development efforts as being integrated with succession planning in order for processes to be effective in meeting the organization’s leadership needs (Groves, 2007). Thus, as with Hall (1986) and Friedman (1986; 1986b), numerous researchers now state that effective succession planning requires moving beyond a replacement strategy, wherein one identifies and appoints successors to vacant positions, to strategizing for a culture that is supportive of developing leaders throughout the organization (Barnett & Davis, 2008; Day, 2001; Groves, 2007; Lynn, 2001).

Given the problems associated with succession planning in nonprofit leadership (Bugg & Dalhoff, 2006; Hall et al., 2005), especially with respect to replacing board members, integrating succession planning and leadership development systemically is an important consideration for both practitioners and researchers seeking to improve nonprofit and voluntary organization leadership capacity. I believe the leadership succession and development literature has implications not only for the types of leadership interventions one develops for organizations, but this literature can also inform where and how one intends to implement interventions for design-based research. In essence, the design-based researcher must recognize the limitations of one program’s effectiveness for leadership development while understanding that an intervention will work towards the development of leadership capacity as part of a systemic development effort. Thus, the degree to which a leadership development culture exists or is desired within a host organization is something that must be considered when conducting research in this field.

Chapter 3 continues this literature review by situating the design of the virtual mentoring innovation within the literature reviewed in this second chapter. Details on the implications of the leadership succession and development literature for the scope and design of this study are discussed in Chapter 4.
Chapter 3.

Literature Review Part II: Situating the Design of the Innovation

3.1. Overview

While Chapter 2 reviewed literature from relevant fields that could inform leadership development for voluntary organizations, this chapter presents literature on theories and concepts that directly informed the design of the virtual mentoring intervention. This literature was uncovered during the review in the previous chapter. In Chapter 3, I also make explicit the process used to synthesize literature to arrive at key design influences, with these influences intersecting along leader-member exchange theory (LMX), volunteer motivation and leadership, and mentoring.

3.2. Synthesis at the intersection of Leader-Member Exchange Theory, Volunteering, and Mentoring

Based upon my review of relevant literature from the nonprofit and voluntary sector; leadership theory; leadership development; and leadership succession, I found the following to be particularly influential in the development of this study:

- Pearce’s research on voluntary organizations provided insight into the motivation of volunteers and the nature of leadership by default.

- Relational approaches to leadership, which emphasize the development of relationships, were deemed appropriate for informing the design of a leadership development intervention for voluntary organizations, wherein leadership relationships are ambiguous. LMX, in particular, provided a rationale for studying the development of high-quality relationships between leaders and members. LMX was viewed as capable of providing insights into how to address the leadership challenges of voluntary organizations, given that LMX researchers had observed the development of ownership and
accountability for shared goals among members of dyadic relationships, characterized as high quality.

- The finding that LMX and mentoring are compatible approaches for studying leadership was critical in determining the orientation of the study and the design of the intervention. LMX and mentoring combined to reveal that a mentoring environment would facilitate the exploration of how high-quality relationships between volunteer leaders, as mentors, and potential leaders, as mentees, could contribute to leadership development.

The following sections describe how these different areas of research came to influence the design of my study.

### 3.2.1. Leadership by default in voluntary organizations: The challenge identified

Pearce (1980, 1993) explains that volunteering is both work and leisure, and it is best described as unpaid labour. While paid workers receive perquisites, such as being provided with assistants and larger salaries, with leadership appointments, volunteer leaders are not provided with these incentives. Leadership allows for more influence on organizational directives, but leadership for a volunteer also means the acceptance of more responsibility for ensuring that the organization is running smoothly. Volunteer leaders are often tasked with not only planning and governance but also administrative and other day-to-day duties. Consequently, volunteer members may not want to spend their leisure time on such tasks. Therefore, it is unsurprising that many choose to avoid appointments to leadership positions.

Pearce (1993) further explains that unpaid workers may volunteer for an organization because they believe in the good works it performs. However, the ideals that are embodied by these good works can also be performed by other organizations. Thus, volunteers do not necessarily commit to organizations; rather, they commit to the services that are provided by such organizations. Volunteers can be relied upon to perform those tasks that directly serve the organization’s beneficiaries. However, having completed the good works for which they volunteer, they do not necessarily feel obligated to take on duties they perceive as being of secondary importance. These duties include the administrative tasks of volunteer leaders, which many unpaid workers do not find appealing. Rather than apathy, then, Pearce suggests that it is self-interest
that influences volunteer participation. A voluntary organization, thus, becomes
dependent upon a reliable but small group of volunteer leaders, whose expertise could
easily be lost should its members eventually leave the organization (House, 1977;
Pearce, 1993). As previously mentioned, Pearce refers to this group as *martyred leaders*. Pearce found that volunteers who actually accepted leadership roles were those
who believed strongly in the goals of that particular organization and wanted to contribute to its success. Other volunteer leaders were those who found the leadership tasks enjoyable. Thus, the challenge for the organization is to recruit more members into its leadership core and to ensure that the cumulative experience of past leaders is passed to newer ones. Moreover, potential volunteer leaders must be prepared for the increased responsibility, because Pearce found that new volunteers who were eager to participate were often given responsibility quickly and, consequently, learned to avoid accepting new tasks.

3.2.2. Narrowing the theoretical lens for leadership to LMX

Having identified leadership succession as a primary challenge to voluntary organizations and, further, understanding that this challenge relates to the willingness of members to take on leadership opportunities, I sought a theoretical lens for leadership by which to interpret the problem and inform the design of my intervention. The leader-centric approaches were inappropriate to the nonprofit environment because leadership succession in voluntary organizations requires understanding followers’ leadership motivations. The situational approaches, while relevant, assume that followers are already committed to a particular workgroup task. Therefore, these approaches were not well suited to informing an innovation directed towards bringing members into fuller leadership participation and aimed towards acceptance of leadership roles. Similarly, role influence approaches provide a useful lens for viewing how leaders should conduct themselves, but they do not provide information on how to increase leadership capacity. Only relational approaches provided insights on how to meet this challenge.
Leader-member exchange as a theoretical lens for leadership

Among the relational approaches, I decided that leader-member exchange theory was the most useful for guiding the design of the virtual mentoring innovation. LMX was deemed an appropriate fit because it does not presuppose the existence of an established work group or team structure, wherein the leader’s responsibility is to steer the group toward a goal. As a result, LMX aligns with the identified leadership situation in which the mentoring environment will be implemented, which is a voluntary organization in which experienced leaders (mentors) might not necessarily have a direct supervisory relationship, on an assigned work group task, with potential or new leaders (mentees). In addition, LMX could inform the study of traditional mentor-mentee pairs. Additionally, LMX provides a descriptive theory, with prescriptive value, in that leader-follower dyads display relational characteristics espoused by transformational leadership when their relationships are high quality (Dansereau et al., 1975; Graen & Cashman, 1975; Graen & Uhl-Bien, 1995). While low-quality dyadic relationships are observed to be transactional, with each respective member concerned with mutual goals only insofar as these serve respective self-interests (Dansereau et al., 1975; Graen & Cashman, 1975; Graen & Uhl-Bien, 1995), the subordinate who is in a high-quality dyadic relationship has been observed to shift from having an attitude of self-interest to one where concern for the group and, hence, organizational capacity is increased (Graen & Cashman, 1975; Graen & Uhl-Bien, 1995; Northouse, 2007).

LMX developed through empirical studies investigating the dyadic relationships between leaders and members using quantitative, longitudinal methods; observations; and interviews. For instance, Dansereau et al. (1975) and Graen and Cashman (1975) studied, over the course of nine months, a department that had recently undergone reorganization, with 50% of its 60 managers being new to the department, 33% of managers being new organizational members, and 90% of the relationships studied having at least one new member. Graen and Uhl-Bien (1995), based upon their retrospective review of LMX research, proposed that LMX describes how relationships move from ones of transactional leadership, wherein the leader motivates subordinates through material or psychosocial incentives, to ones of transformational leadership, wherein the leader motivates in such a manner that subordinates place the group’s goals
ahead of their own (Dansereau et al., 1975; Graen & Cashman, 1975; Graen & Uhl-Bien, 1991; Graen & Uhl-Bien, 1995; Northouse, 2007). Given that a shift from transactional to transformational leadership brings about positive outcomes in paid organizations, this shift toward transformational leadership might arguably be more critical to voluntary organizations. Since volunteer work involves no remuneration for services exchanged, it requires that members think of the common good to a greater extent than in paid organizations. LMX provides some guidance on how this shift can be achieved through relationship building and, therefore, is useful for guiding this study.

Moreover, since LMX does not prescribe that leaders assume particular roles or behaviours to develop high-quality relationships, an opportunity exists to observe naturalistically how such relationships develop between an experienced volunteer leader and a potential or new leader, within the context of a virtual mentoring relationship. Greater insight into how mentors and mentees perceive and negotiate their relationships can be gained by observing online mentoring interactions. Identification of those issues that influence the development of high-quality mentoring relationships can then be developed inductively. In addition, such an investigation could lead to an understanding of whether such relationships contribute to a willingness to commit to voluntary leadership roles.

3.2.3. Tying LMX to the challenge of voluntary leadership succession

The foundation for LMX’s development is based upon the finding that dyadic relationships can be categorized as being either part of an in-group or part of an out-group (Graen & Cashman, 1975). In other words, members from high-quality relationship dyads become part of the leader’s in-group, and those who do not become part of the out-group. When observing the organizational behaviour of volunteer leaders, LMX can be used to identify those relationships that are part of a voluntary organization’s tightly knit core group (in-group), which is composed of leaders and members who influence decision making and do much of the organizational work, and those relationships that arise between volunteer leaders and peripheral organizational members (out-group). Pearce (1993) found that leaders in understaffed voluntary organizations did not make
peripheral members feel needed nor did they provide members with opportunities to develop relationships with the core or other organizational members. In these cases, peripheral members felt unimportant and isolated. These members seldom took initiative to work with leaders; instead, they left their leaders to assume the tasks.

Through the process of leadership-making, LMX provides a prescription for leader-member relations by asserting that leaders must aim for high-quality dyadic interactions with each of their members and strive to bring each one into the in-group (Graen & Uhl-Bien 1991; Graen & Uhl-Bien, 1995; Northouse, 2007). These relationships are considered differentiated because each follower is treated as an individual. The process of building relationships between leaders and followers contributes to the development of a network of dyadic partnerships across the organization (Graen & Uhl-Bien, 1995; Northouse, 2007), which is reminiscent of Grove’s culture of leadership development.

In paid organizational settings, cumulative empirical research that explored the relationship between a variety of variables, such as the negotiation of latitude of a member’s role, on the development of vertical manager-member dyads’ relationships, led to the conceptualization of leadership-making (Dansereau et al., 1975; Graen & Cashman, 1975; Graen & Uhl-Bien, 1991; Northouse, 2007). Leadership-making is viewed as encompassing three phases—stranger, acquaintance, and mature partnerships (Graen & Uhl-Bien, 1991; Northouse, 2007). Through leadership-making, members become self-managing team players who monitor and manage their own performance (Graen & Uhl-Bien, 1991). As the dyad ideally moves from the first to the third phase, the relationship becomes stronger as trust and reciprocity between leader and follower increases (Graen & Uhl-Bien, 1991; Northouse, 2007). In this process, leaders and members are theorized to move from the stranger stage, when relationships align with Bass’ (1985) model in which members respond to rewards; reinforcement; or the potential for punishment, through to the acquaintance stage of limited exchange of services that are of interest to each party (Graen & Uhl-Bien, 1991). From this acquaintance stage, the relationship would develop into mature relationships, characterized by trust; loyalty; and shared goals (Graen & Uhl-Bien, 1991). Thus, the
process would lead to transformation, from that of being self-interested members to being team players working toward common goals.

Over the years, the concept of leadership-making has become more complex, with Graen and Uhl-Bien (1995) theorizing that these three stages lead to a fourth phase, wherein differentiated dyadic partnerships are found within organizational groups and networks. Yet, exactly how relationships are negotiated, as dyads move through these phases, is still not well understood (Northouse, 2013; Uhl-Bien, 2006). For instance, Northouse (2013) states that the theory does not explain how leaders build high-quality relationships that foster trust and commitment. In addition, LMX does not explain the dynamics of how these relationships foster desired outcomes. Rather, LMX uses Burns’ theory of how relationships become transformational to explain the development of trust (history of reciprocal exchange of favours between a leader and follower) and commitment to the team (realization that one’s personal goals are met in conjunction with team goals) over self-interest (Graen & Uhl-Bien, 1991). As the next sections reveal, I believe that conducting research informed by both LMX and mentoring has the potential to narrow these gaps in LMX theory.

3.2.4. Linking LMX and Mentoring

LMX and traditional mentor-mentee relationships are compatible in that these are both based upon dyadic relationships. Moreover, research into leadership mentoring may provide insights into the process of leadership-making. According to Hezlett & Gibson (2007), who reviewed literature in which social capital theory was used to examine mentoring, effective mentoring is undergirded by the development of trust between mentors and mentees. Research into leadership mentoring might, therefore, prove useful in providing insights into the process of developing high-quality relationships, which foster trust.

With respect to the trust literature, a relational leadership model bridging LMX research and trust research (Mayer, Davis, & Schoorman, 1995; Gill, Boies, Finegan, & McNally, 2005) has been developed by Brower, Schoorman, and Tan (2000). They recommend that this model be used to further understanding in both areas. While my
study is exploratory, inductive, and volunteer-oriented, I view Brower et al.’s model as providing support for research into how trust influences relationships within an LMX framework. Brower et al. (2000) state,

[W]e attempted to integrate two disparate streams of research, and in so doing, advance our knowledge of both areas. The vast majority of the research on trust in business environments is relatively recent, and there remain many gaps in the empirical literature on trust. Researchers have called for models and empirical tests to determine how trust is developed between supervisors and subordinates (Whitener et al., 1998). The research on LMX has accumulated over the past 25-year period and is thus more extensive and comprehensive. As researchers have become more interested in interpersonal relationships between leaders and their subordinates, there has been greater convergence between general theories of interpersonal trust and LMX. (p. 245)

Thus, not only are mentoring relationships and trust related, but trust researchers also see promise in studying LMX and trust.

Leadership mentoring has also contributed to organizational commitment, according to Scott (2010), who conducted a mixed method study on leadership mentoring for a Canadian Catholic School Board. In addition, leadership mentoring has been found to promote collaborative networks across an organization (Groves, 2007). Groves’ findings, which have been previously discussed, give reason to posit that mentoring studies can provide insights into how high-quality relationships contribute to organizational commitment, since the encouragement of mentoring relationships, at all organizational levels, was found to contribute to a culture of leadership development in best-practice organizations.

One study has already examined the relationship between career mentoring and LMX. Scandura and Schriesheim’s (1994) study of 183 managerial dyads, in which a confirmatory factor analysis on LMX and mentoring actions was conducted, found that managers viewed their career-mentoring actions as being distinct from the leader-member actions promoted by LMX, but their subordinates did not distinguish these actions as being different from each other. Career mentoring measures related to the long-term personal resources used by managers toward the development of subordinates, while leader-member exchange measures centred on the nature of the
working relationship. Scandura and Schriesheim speculate that the difference between manager and subordinate perceptions is related to the fact that managers knew when they were providing mentoring or LMX functions, while subordinates did not. They suggest that future research aim to understand why subordinates could not differentiate between mentoring and leadership-making. Scandura and Schriesheim found that mentoring and LMX were complementary, in that mentoring was a good predictor of positive gains in salary growth and promotion rate among subordinates, while LMX was a good predictor of positive gains in subordinates’ performance. They also suggested that mentoring researchers study the dyadic relationships of mentors and mentees by including measures that could furnish insights into how transactional and transformational relationships affect mentees’ career outcomes.

From the standpoint of this researcher, what is clear is that mentoring and LMX are compatible constructs within the context of the paid organization. However, what are unclear are the outcome measures that would be supported by volunteer leadership mentoring and the sorts of mentoring actions that would be measured for Scandura and Schriesheim’s research suggestions to be extended to voluntary organizations. Further, it is not evident in what ways mentoring and LMX actions would be different, when career and performance outcomes are replaced with leadership outcomes that both leadership mentoring and LMX promote. Nevertheless, Scandura and Schriesheim’s recommendation that mentoring researchers consider LMX constructs, when conducting their research, is aligned with the goals of this study, which sought a better understanding of the volunteer leadership process and the outcomes that result from high-quality mentoring relationships.

3.2.5. The influence of LMX, volunteerism, and mentoring on this design-based research study

Professional association literature has promoted the role that mentoring, framed by the LMX perspective, can play to support volunteer leadership development (Camplin, 2009). However, LMX is built upon the experiences of paid workers, not volunteers. According to Graen and Uhl Bien (1991), who studied self-managing teams, and to Northouse (2013), the leader provides the worker with the opportunity to
participate in projects and work-related tasks to initiate the leadership-making process. Paid workers view these tasks as career development opportunities, leading to better organizational positions and perquisites (Northouse, 2007). On the other hand, volunteers are reluctant to accept leadership roles and become responsible for leadership's requisite tasks during leisure time (Pearce, 1980; 1993).

However, a closer examination of Pearce’s (1993) findings can shed light on how mentoring may provide social incentives that could be used to initiate the processes of leadership-making and leadership development among volunteers. Pearce (1993) proposes that cohesion commitment is the strongest form of commitment observed in voluntary organizations. Cohesion commitment refers to the social ties that volunteers develop within or through the organization (Kanter, 1968; Kanter, 1972; Pearce, 1993). Yet, Pearce noted that peripheral members often perceive voluntary organizations to be clique-driven. Moreover, a lack of opportunity for the development of social ties exists within understaffed voluntary organizations, and this lack of opportunity has led to feelings of isolation on the part of peripheral members (Pearce, 1993). The implementation of a formal mentoring program necessitates that leaders from the tightly-knit core group interact with volunteers, which could afford opportunities to foster the social ties needed to develop cohesion commitment within the organization. As previously noted, Pearce found that organizations that provided new volunteers with orientation sessions and training had more stable membership than others. In addition, the longer that a member volunteers for an organization, the more likely it will be that this member will become part of the core group (Pearce, 1993). A virtual mentoring program can provide for such orientation and developmental training; therefore, the program can be studied to explore how it contributes to more stable membership and to increase understanding of how members become part of the core group.

As previously noted, Pearce found that volunteers will commit to perform tasks they believe to be important to the achievement of organizational goals. However, volunteers might be more committed to the goals of the organization than to the organization, itself. Volunteers who committed to leadership did so because they believed in the mission of the organization or found the leadership activities appealing. Mentoring provides for the opportunity to introduce mentees to organizational narratives
that make the organization and its mission unique, thus, potentially building commitment to that particular organization. Moreover, Kanter (1972) found that continuance commitment, which is related to the continued survival of the organization, was developed when members recognized that personal sacrifices would be required of them upon joining the community or organization and that this was necessary to ensure that collective goals could be met. The mentoring program can be designed to demonstrate the importance of leadership to the attainment of organizational goals and to provide for a more balanced view of leadership, which could make becoming a leader more relevant and attractive to peripheral members. A mentoring program designed to take into account the situational factors described above may provide the sorts of incentives that volunteers find sufficiently attractive to consider participating in the leader making process, which could, in turn, lead to a greater willingness on the part of volunteer members to accept leadership roles. By studying the mentoring relationships between leaders and followers participating in the program, insights could be gained into the types of interactions needed to move volunteers from out-groups to in-groups. Mentoring may provide a forum in which a commitment to the organization’s survival or continuance commitment is developed (Kanter, 1972; Pearce, 1993).

Graen and Uhl-Bien (1995) proposed that leadership studies be conducted at the level of the leader, the follower, and the leadership relationship to advance leadership development theory. Graen and Uhl-Bien (1995) state,

[A] relationship-based approach would focus on the dyadic relationship between the leader and the follower. The critical question of interest in this case would be: What is the proper mix of relational characteristics to promote desired outcomes? … [O]nce the proper mix for each of these domains considered in combination is identified, a subsequent question could address the issue of how these domains may be influenced to enhance the effectiveness of leadership within given situations… In particular, as leader (leader-based), follower (follower-based), and relationship (relationship-based) issues become apparent, studies could then focus on how characteristics that are identified may be developed to promote desired outcomes… Investigation would take on a prescriptive nature, with studies using experimental designs and longitudinal approaches. Based on this information, training programs focusing on the development of leadership within all of the domains could result. (pp. 223-224)
While Graen and Uhl-Bien (1995) frame this investigation from a nomothetic perspective, the design-based research orientation of this study presents a complementary approach (Brown, 1992) in which salient features of such relationships can be identified in the naturalistic settings in which leadership development programs take place. Specifically, this setting would be that of a virtual mentoring program for volunteer leadership development.

**Negotiating ontological issues**

Design-based research is constructionist in orientation. DBR was developed as an approach to understanding learning in context, and it can be useful in studying leadership development. This approach is seemingly more aligned with the social constructionist theories of relational leadership. However, DBR is also pragmatic in orientation and recommends seeking existing theories and concepts, even those that come from different ontological perspectives, to inform the design of a learning environment. From this initial design, new understandings about the construction of learning can be gained by exploring how participants arrive at new understandings within the environment. This research approach is also conducive to developing new insights in areas outside of academic settings, such as in leadership development and succession.

It is with this pragmatism that I chose LMX, with an entity perspective, over other relational approaches to explore virtual mentoring for volunteer leadership. As detailed in the above discussion of the literature, LMX provided evidence that high-quality relationships can foster greater accountability for organizational goals. It is also a theory with an identifiable gap—that of not being able to explain how these very relationships come to be—which this study could contribute to narrowing. The selection of LMX, therefore, does not create ontological difficulties, for it is the narrowing of this gap in our understanding of *relationship development*, by researching how participants construct their mentoring relationships and new understandings within the learning environment, that is of principal interest to this study.

Thus, without limiting myself to the study of direct supervisory relationships and in maintaining the difference between leader and leadership development, which aligns with *relational perspectives* on leadership, I have used LMX to guide my research
design. Furthermore, since this study was not designed to test LMX theory, I was not precluded from using a relational perspective on leadership to gain insight on

- the process by which leaders and followers come to understand their respective roles;
- the nature of leadership;
- the process of how relationships are negotiated and come to be known; and
- the way in which the mentoring innovation contributes to an increased willingness to accept leadership.
Chapter 4.

Intervention Design

4.1. Overview

In design-based research, the design of the learning environment is critical because it is by observing ways in which the environment affords participants’ construction of theorized behaviours, attitudes, perceptions, or understandings that inferences about the phenomenon under study are made. It is the importance of finding useful theoretical and conceptual influences for this design that required the extensive review of related literature in Chapters 2 and 3. In this study, the virtual mentoring environment was designed to explore leadership development between volunteer leader-mentors and potential- or new leader-mentees, with a focus on the development of high-quality relationships theorized to contribute to a greater willingness to accept leadership on the part of mentees. This chapter details the design of this mentoring program, which will, hereafter, be referred to as Catholic Leadership Mentoring (CLM). First, decisions made with respect to context and scope will be discussed. Second, the design commitments of the virtual mentoring program will be explained. Third, the description of the host organization will be provided.

4.2. Central Design Decisions: Context and Scope

Voluntary organizations, despite their similarities, remain a diverse group. Thus, decisions had to be made with respect to what sort of design and research context would provide an appropriate foundation for future research and practice. The first key decision was to determine for whom the innovation would be designed. The second key decision was to determine whether to design a program targeted toward all voluntary organizations, a particular sector of these organizations, or a single organization.
4.2.1. Designing for leadership context

The most critical design decision involved deciding for whom to develop the virtual mentoring program. Should the program be designed for organizations that were in need of leadership development, but were unlikely to have the culture or infrastructure to sustain it? Conversely, perhaps it should be designed for organizations more likely to be able to sustain such a program, due to their already being supportive of leadership development programs and potentially having existing interventions in place. Ultimately, the decision was made to design a program for organizations that would view it as being useful to their leadership development efforts and would provide an environment conducive to the innovation’s future sustainability.

Two factors contributed to this decision. First, the leadership development literature suggests that no one particular practice or intervention, such as mentoring, can provide for all of an organization’s leadership development needs. What is most conducive to the success of these efforts is a sustained commitment to leadership development across the organization (Day, 2001; Day & Halpin, 2001). Second, while they recommend that design researchers factor into their designs a ruggedizing element to make them more sustainable in environments considered inhospitable to the interventions, Clarke and Dede (2009) also assert,

[T]he robust-design approach has intrinsic limits, as some essential conditions that affect the success of an educational innovation cannot be remediated through ruggedizing.... Essential conditions for success such as student presence and district willingness to implement pose challenges beyond what can be overcome by the best robust designs. (p. 30)

Given the importance of having organizational support for the success and sustainability of leadership development, the decision was made to design the program for voluntary organizations that already had some form of leadership development in place and, therefore, already displayed a willingness to support this type of intervention.
4.2.2. Designing for organizational scope

The second question that needed to be answered involved the scope of the intervention. Specifically, should this intervention be created for a variety of organizations, or should it be developed for only one? The decision was made to focus on a subsector of the nonprofit sector that shared a similar leadership culture, but also provided enough breadth for a variety of organizations to fall within its scope. Clarke and Dede (2009) also suggest that design research aim to provide for scalability. While little is known about factors that must be scalable within a volunteer leadership mentoring program, one issue that affects scalability is the ability to extend an intervention or what has been gleaned from research into the intervention to other areas. Thus, the subsector for which the intervention is designed must be one whereby its leadership development experience will prove meaningful to other voluntary organizations.

4.3. Organizational Context: Catholic Voluntary Organizations

In order to design a leadership development innovation, an organization’s leadership culture, mission, and needs must be known. Thus, the central design decisions involved defining the organizations for which the virtual mentoring program would be designed. Based upon my acquaintance with Catholic¹, also referred to as Roman Catholic, voluntary organizations, I recognized that these organizations have supports in place that increase the potential for sustainable leadership development efforts. Moreover, they have a similar culture that allows for the scope needed to contribute to a better understanding of leadership within a variety of Catholic voluntary organizations, as well as provide for insights that would be of general interest to researchers of and practitioners in the nonprofit sector.

¹ Within this study, the term Catholic will be used to refer to the religion in keeping with the emic perspectives of the participants who refer to the organization as Catholic. This is aligned with the usage of the term Catholic in such principal works as The Catechism of the Catholic Church. However, it is acknowledged that the term Roman Catholic is often used to refer to the religion, especially in English-speaking countries.
Past experience with and research into Catholic voluntary organizations has provided me with insight into the challenges and expectations of new leaders as they transition into their leadership roles (Guloy, 2006). My findings revealed that leadership development and succession is an ongoing concern for Catholic voluntary organizations and parishes. However, it is also a concern that Catholic organizations are addressing (Belmonte & Cranston, 2009; Boldra et al., 2008; Canavan, 2001; Cullen et al., 1997; Giganti, 2003; Healey, 2005; Hume, 1994; Scott, 2010). Using combinations of the terms: Catholic, leadership, and program, a web search reveals a number of Catholic leadership development initiatives, which are designed for both the religious and the laity. Examples of programs, offices, or institutes that support leadership development include Esteem (Esteem page); the Archdiocese of Vancouver’s Office of Youth and Young Adult Ministry (OYYAM page); Office of Catholic Youth’s Catholic Leadership Program for the Archdiocese of Toronto (OCY Leadership Program page); Habiger Institute for Catholic Leadership (Habiger page); The National Leadership Roundtable on Church Management (National Leadership Roundtable page); and the Catholic Leadership Institute (Catholic Leadership Institute page). Moreover, leadership development programs can be found within voluntary organizations (Couples for Christ page, Christian Formation section, ¶ 3; Oregon Retrouvaille Formation Weekend page).

The current organizational climate found within the Catholic Church and its organizations is open to the use of theories from organizational management and leadership studies to address needs for leadership, not only among the clergy, but also among the laity (Canavan, 2001; Catholic Leadership Institute page; Giganti, 2003; Healey, 2005; National Leadership Roundtable page). This is aligned with Vatican II’s Lumen Gentium (Paul VI, 1964) and the call of Pope John Paul II for a new evangelization, wherein ownership of the Catholic Church’s mission belongs not only to those who have taken a vow of religious life, but to all its members (Hocken, 2004; John Paul II, 1990; John Paul II, 1994/2005). Within such a climate, numerous lay movements, which establish nonprofit organizations, charities, and associations, have arisen (Hocken, 2004). These organizations are headed by volunteers who require leadership skills and the greater theological understanding associated with being Catholic leaders (Codex Iuris Canonici, Canon 231, 1983). In North America and Western Europe, religious orders that operate schools, hospitals, and charities are
increasingly transferring control of these organizations to lay boards. However, these orders also seek to address concerns about the continuance of Catholic leadership culture upon completion of these transfers. Some orders have introduced interventions to ensure that the Catholic tradition of leadership endures within the organization (Boldra et al., 2008; Cullen et al., 1997).

A web search revealed that some Catholic organizations, from schools to youth ministries, already have some form of mentoring in place (Esteem page, For Students section; OCY Leadership Program page, ¶ 4; Salford Archdiocese Schools Catholic Leadership page, Main Elements section, ¶ 1). In addition, academic research into principal preparation programs has studied the principal mentoring program for a Catholic school board in Alberta (Scott, 2010). Mentoring programs are also in place within the Catholic health service sector (Boldra et al., 2008; Cullen et al., 1997). At the level of nonprofit voluntary organizations, archdioceses and leadership institutes provide leadership development and training to parish ministries and voluntary organizations. In-house programs also exist in larger organizations (Couples for Christ page, Christian Formation section, ¶ 3; Focolare Page; Oregon Retrouvaille Formation Weekend page).

As previously noted, the concerns about leadership development and succession held by Catholic voluntary organizations are shared by other nonprofits. Since religious organizations represent one of the largest nonprofit sectors, the study of one branch of these organizations provides insight into situations faced by this sector, which also intersect with those faced by secular nonprofits. While all religious organizations do not share the same beliefs, the leadership development efforts of one religious group will be informative to others facing similar issues regarding the recruitment of members, volunteers, and leaders within secular societies. The need to increase understanding of how faith-based organizations operate to attain their goals is affirmed by growing interest in the role of faith-based organizations in the international development and nonprofit sectors (Berger, 2003; Bode, 2003; Clarke, 2006; Lukka & Locke, 2000).

Voluntary religious organizations are also important to study because of the correlation between religiosity and volunteerism (Wilson & Janoski, 1995; Lukka & Locke, 2000). Studies have been conducted within Catholic organizations to further
understanding about leadership. One study examined the exemplary leadership practices found within Catholic orders because the concept of organizational mission, which is central to contemporary leadership, began in such communities (Nygren, Ukeritis, McClelland, & Hickman, 1994). Another study explored gender differences in leadership styles, which was afforded by a comparison of the leadership styles and culture of all-women and all-men religious orders (Druskat, 1994).

The network of Catholic organizations and their contribution to spiritual life, education, health, and social welfare is extensive and global in reach. Catholic voluntary organizations are diverse and range from small, parish-based organizations to RNOs, such as the Canadian Catholic Organization for Development and Peace (Development and Peace page). Within the Archdiocese of Vancouver, 66 voluntary organizations are included in the 2010-2011 Catholic Directory (The BC Catholic, 2010). This number does not include the Archdiocese’s own ministries and services, nor auxiliaries associated with Catholic orders, hospitals, schools, or residences. Studying how virtual mentoring can contribute to volunteer leadership development and succession within a Catholic context would be of practical and scholarly interest, given the breadth of these organizations and the scope of their work. In addition, the potential scalability of the intervention is strengthened because of the existence of this vast network of organizations.

4.4. Intervention Design: CLM

The design of the virtual mentoring program, Catholic Leadership Mentoring, was influenced by existing theory and literature; the context in which it would be set; and program goals. Intervention design will be the focus of this section. While research design also played a role in design decisions, it will be discussed in Chapter 5: Research Design: Framework and Procedures.

4.4.1. Mentoring orientation

As mentioned in Chapter 1, virtual mentoring environments are seen as having the potential to influence leadership development within organizations. Virtual
asynchronous mentoring is viewed as being especially promising in situations wherein mentors may not be available at the same time or place as mentees. For instance, voluntary organizations may lack local leaders with the experience needed to mentor potential or new leaders, or its volunteers may find it challenging to schedule synchronous mentoring sessions. In addition, virtual mentoring environments provide a platform that allows a researcher to triangulate the self-reported experiences of mentors and mentees with observations of their online, written communications.

Within the context of the CLM, an experienced leader mentored a potential or new leader. While group mentoring and peer mentoring models were considered (Day, 2001; Douglas, 1997; Headlam-Wells et al., 2006; McCauley, 2005; Ritchie & Genoni, 1999; Single & Single, 2005), the decision was made to design for online mentoring between an experienced mentor and a less experienced mentee, based upon traditional mentoring conceptions (Bierema & Merriam, 2002; McCauley, 2005). This form of mentoring is conducive to the study of individualized leader-follower dyads, as conceptualized by LMX. Furthermore, the personal nature of leadership and the potential for sensitive topics and issues to arise (Bolam, Dunning, & Karstanje, 2000), which the mentor or mentee may not want to share with others (Stead, 2005), require the confidentiality to the pair afforded by this type of mentoring, according to Bolam, McMahon, Pocklington, and Weindling (as cited in Hobson, 2003); Monsour (as cited in Hobson, 2003); and Shenkman (2008). The virtual nature of the program also limited participation to those who have access to computer technology; have a grasp of spoken English; and could write in English or French, which are the languages that I can read, write, and understand.

4.4.2. Program goals

Within the context of the CLM, a Catholic leader is conceived to be a Catholic who holds a position of leadership, but not a position that is necessarily within the host organization. Thus, a Catholic leader is one regardless of setting, Catholic or non-Catholic. To contextualize these experiences to that of the host organization, mentors were encouraged to share their experiences as host organization leaders with mentees. The leadership development goals of the program involved providing mentees with a
better understanding of Catholic leadership principles, such as the Beatitudes and the Golden Rule, and how these could be applied within the context of leadership activities, such as mission setting and team building, critical to the attainment of host organization goals. In addition, mentors and mentees discussed and reflected upon how these principles could be applied to their everyday lives and roles within non-Catholic organizations.

4.4.3. Program structure

The structure of the CLM will be discussed in this section. Specifically, I shall describe the discussion material, mentor and mentee training, the orientation session, and the mentoring task.

Discussion material

Daresh (1995) found that effective mentoring relationships require that mentees have some background in leadership practice. However, within the context of voluntary organizations, volunteer members may not have the requisite background necessary to contribute as effectively to the mentoring process. For this reason, mentees were provided with audio material presenting Catholic leadership principles that relate to how one can be a Catholic leader in one’s daily life. The decision to use material that focuses on the application of Catholic leadership principles to daily life allows the program to remain relevant to mentees whose experiences may not yet include leading within a Catholic organization, while at the same time grounding the program in Catholic theology and culture. The audio material provided a foundation for discussions between a mentor and mentee. Mentors were then to provide organizational context to the material, while mentees reflected upon their own lives as Catholics and on what leadership means to them.

The program has been structured around publicly accessible audio segments of Spirit of Catholic Leadership, a television program developed for EWTN (Global Catholic Network), by Father Robert J. Spitzer, S.J. (2004). This material was selected to represent the organization’s voice, during the leadership mentoring process, and presents an opportunity for mentor and mentee to further their understanding of Catholic
leadership (Scott, 2010). The material presents a leadership view consistent with Catholic theology and transformational leadership theory (Spitzer, 2000).

Spitzer is well regarded within the Catholic community, having been the former president of Gonzaga University. He is a recognized expert in leadership through his work with The Spitzer Center for Ethical Leadership and EPI (EPI page; The Spitzer Center page). Through these two organizations he has provided consultation services to nonprofit and for-profit companies, as well as faith-based and secular organizations. The Catholic community’s recognition of Spitzer and EWTN helped ease access to entry because the discussion material was viewed as having the theological and theoretical grounding that these organizations require for leadership development programs (Canavan, 2001; Cullen et al., 1997).

Mentor’s role and training

The mentor’s role was to support the mentee by situating the audio material within the culture particular to the host organization. The mentor was to introduce the mentee to the applied aspects of leadership by sharing experiences and perspectives with the latter. Since the goal of this research was to explore dyadic mentoring interactions that occurred naturalistically, mentors could define how best to support the mentee, given program goals. Thus, mentors were given general guidelines about developing mentoring relationships, but not prescriptions on when to provide facilitative, coaching, advising, or psychosocial support (Kram, 1985).

Mentee’s role and training

The mentees listened to the audio material and reflected upon it to construct their view of what leading means to them, as well as what it means to the organization in which they volunteer. Potential and new leaders were strongly encouraged to participate, but were not required to do so in order to increase the likelihood that mentees are willing to accept being mentored, which has been found to be necessary for an effective mentoring relationship to develop (Daresh, 1995). Since mentee training has been found to contribute to the overall satisfaction of mentors who participate in a program (Kasprisin, Single, Single, Ferrier, and Muller, 2008), mentees attended an orientation session designed to help them understand what was required of them to participate.
effectively, and they were encouraged to be open in their communications with their mentors (Daresh, 1995; Daresh & Playko, 1995).

**Orientation session**

I met with mentors on an individual basis, via videoconference\(^2\), to discuss their role and prepare them for the orientation session with their respective mentees. The mentees were then emailed a document presenting an overview of the CLM, prior to their orientation session. This document also provided information on the mentee’s particular mentor (see Appendix A). An orientation session was conducted for each mentor-mentee dyad via videoconference. In this session, the mentor and mentee were introduced to each other for the first time within the context of the CLM. Information was provided to them about their roles, responsibilities, and the code of conduct to be followed within the mentoring program. In cases where synchronous video conferencing was not feasible, because of scheduling or technical issues, the mentor recorded a video for the mentee.

The orientation was divided into three parts. The first part of the orientation session involved explaining, to the mentee, the approach the mentor planned on using for the mentoring discussions. The second part involved training the mentor and mentee on how to use Knowledge Forum and Audio Re-Searcher; this mentoring task will be described in the next section. The third part involved having the mentor and mentee discuss how they planned to coordinate and notify each other about discussion posts. I explained the need for confidentiality, gave information on the research incentive being offered to participants, and fielded questions about the research study and mentoring program.

**The mentoring task**

The participants were asked to review audio material on leadership within the context of Catholic organizations. Each audio segment was 27 minutes in length. The participants used Audio Re-Searcher, a web-based tool developed by Frank Zander

\(^2\) Skype was used to videoconference these sessions.
(2011), to tag the audio material. The mentors and mentees were then to discuss the audio segments. They were given six months to discuss the material and their own related experiences. The mentors and mentees could follow specific segments, also referred to as talks, chronologically, or they could select specific ones that were of interest to them. A summary for each audio segment was provided to mentors and mentees to assist them in selecting the talks for the CLM (see Appendix B).

The mentors were informed that they were to help their mentees arrive at a better understanding of leadership within the organization. Specifically, mentors were asked to make the content of the audio material relevant to their mentees and provide them with support on understanding and navigating situations that leaders face, especially within the host organization. I informed the participants that I would observe the online discussions to ensure that these remained respectful. However, I was not to be actively involved in the discussions and would only intervene should the participants need to be reminded of the code of conduct (see Appendix C).

4.5. Requirements Gathering

A requirements-gathering study, approved by Simon Fraser University’s Office of Research Ethics, was undertaken in order to determine the suitability of the chosen audio materials for program participants, the ideal length of time for the mentor-mentee relationships during the CLM implementation, and to test the online mentoring environment. Two mentor-mentee pairs were recruited from a Catholic voluntary organization, which was based in Eastern Canada. The dyads participated for a period of three months. Based upon their experiences, it was determined that the mentoring program be longer than three months to allow for time lags and scheduling issues (e.g., vacations). Six months of mentoring was chosen as the maximum length of participation in the CLM, based on observed participation levels and constraints on my available time for conducting research.
4.6. Catholic Leadership Mentoring: Description

Table 3.1 describes the major design features of the virtual mentoring program:

Table 4.1. Components of the Virtual Mentoring Program

<table>
<thead>
<tr>
<th>Program Component</th>
<th>Function</th>
<th>Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge Forum (Basic Version)</td>
<td>• Supports private, text-based online mentoring discussion</td>
<td>• Centralized location for discussions</td>
</tr>
<tr>
<td>See Figure 3.2</td>
<td>• Allows mentors and mentees to contribute documents to the discussion, through the use of the attachment function</td>
<td>• Provides for customization to afford mentoring program goals (as opposed to emails)</td>
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<td></td>
<td>• Allows for the creation of a mentoring portfolio, wherein mentors and mentees can copy and paste important notes that mark turning points in their discussions</td>
<td>• Affords knowledge construction (Scardamalia &amp; Bereiter, 2006)</td>
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<tr>
<td></td>
<td></td>
<td>• Basic version is simpler to use and has the least compatibility issues, which is suited to mentors and mentees who are not very experienced with technology</td>
</tr>
<tr>
<td>Program Component</td>
<td>Function</td>
<td>Rationale</td>
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<tr>
<td>Audio Re-Searcher</td>
<td>• Provides an audio library for the discussion material</td>
<td>• Provides a centralized location for the discussion material</td>
</tr>
<tr>
<td></td>
<td>• Affords tagging and annotation of the audio material</td>
<td>• Affords reflection through note-taking (Zander, personal communication, May 29, 2011; June 4, 2011)</td>
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<tr>
<td></td>
<td></td>
<td>• Affords the ability to tag audio segments for easier content retrieval (Zander, personal communication, May 29, 2011; June 4, 2011)</td>
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<td></td>
<td></td>
<td>• Mentors and mentees can share annotations and communicate their ideas to one another directly on a particular audio segment. The requirements-gathering study provided data indicating that such a feature would facilitate communications between a mentor and mentee, especially when the mentee is having difficulty conceptualizing and articulating questions regarding a particular point in the audio segment. This experience was supported by findings that mentees believe it important to have the requisite language associated with leadership in order to discuss such topics effectively with their mentors (Daresh, 1995).</td>
</tr>
<tr>
<td>See Figures 1 and 3</td>
<td></td>
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</tr>
<tr>
<td>Program Component</td>
<td>Function</td>
<td>Rationale</td>
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</table>
| Recruiting        | • Mentors were recruited from the past and current leadership of the organization (Camplin, 2009)  
• Mentees were recruited from the general membership, especially from those viewed as having leadership  
potential; new leaders were also eligible to participate as mentees (Details are provided in Research Procedures).  
• Mentors and mentees were required to be at least 19 years of age to participate in the mentoring program  
• Mentors and mentees were recruited from a shortlist of candidates provided by the organization. Both mentors and mentees were required to have routine access to an Internet-connected computer and some familiarity with computers. Mentors and mentees were required to understand spoken English, which was needed when listening to the audio material. In addition, mentors and mentees had to be able to write in English or French, languages understood by the researcher.  
• Recruitment was extended to past leaders through the social capital generated by the organization and to allow for the sharing of their cumulative knowledge, which contributes to the organization’s historical narrative (Camplin, 2009). Recruiting from past leadership would also reduce the workload of current leaders who may be overburdened with administrative tasks (Pearce, 1993)  
• Literature reveals that leaders should mentor others into leadership roles (Groves, 2007; McCall, 2010) | |
<p>| Matching          | • Pairs were matched by the organization | • Pairs were assigned by the organization, in discussion with the researcher. Criteria included background and sex (Daresh, 1995; Headlam-Wells et al., 2006; Hobson, 2003; Ritchie &amp; Genoni, 1999). Details on matching are provided in Research Procedures. |</p>
<table>
<thead>
<tr>
<th>Program Component</th>
<th>Function</th>
<th>Rationale</th>
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</thead>
<tbody>
<tr>
<td>Orientation Session</td>
<td>• Orientation documents were sent to participants via email</td>
<td>• Training contributes to enhanced participation in the mentoring process (Kasprisin et al., 2008; Single &amp; Single, 2005)</td>
</tr>
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<td>• Videoconferenced orientation session was conducted for the pair with the researcher/coordinator present</td>
<td>• Training was provided on how to navigate the learning environment and to give strategies for how to manage online communications (Bierema &amp; Hill, 2005)</td>
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<td>• Stress placed on the importance of openness on the part of the mentee, as well as providing an avenue for the mentor to establish trust and rapport</td>
<td>• Based on findings from the requirements gathering for this study, an orientation session in which the mentor and mentee could meet online, discuss their roles, and receive pointers on how to manage their online communications was suggested. This is supported by Headlam-Wells et al. (2006).</td>
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<td></td>
<td>NOTE: In some cases, orientation sessions had to be recorded by both the mentor and the researcher for the mentee. This was done when technical difficulties were experienced with videoconferencing, making it difficult for participants to participate effectively in the training for Knowledge Forum or Audio Re-Searcher. In other cases, videos were necessary because not all parties could meet for the orientation session. Training videos were posted on Knowledge Forum for reference.</td>
<td></td>
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<tr>
<td>Structured Mentoring</td>
<td>• Structured program was based on discussion materials</td>
<td>• Support exists in the literature for the use of structured mentoring programs for educational leadership development (Monsour, as cited in Hobson, 2003).</td>
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<td>• Code of conduct provided</td>
<td>• Ritchie and Genoni (1990) explain that structured programs occur in organizational settings and have specific aims, as well as codes of conduct.</td>
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<td></td>
<td>• Timelines were determined to be six months, based on the results of the requirements-gathering study.</td>
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## Program Component

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<tr>
<th>Component</th>
<th>Function</th>
<th>Rationale</th>
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<tbody>
<tr>
<td>Unfacilitated Mentoring Discussions (Ritchie &amp; Genoni, 1999)</td>
<td>• The mentor and mentee were provided with orientation material and training, as well as access to mentoring and technical support throughout the program; however, the researcher was not to intervene in the way the mentors and mentees decided to discuss or proceed with the mentoring program, as long as the code of conduct was upheld. &lt;br&gt;• The researcher was to intervene to ensure that discussions were taking place by providing mentors and mentees with support or encouragement when required. This was not done within the Knowledge Forum discussion but through another medium, such as email, phone, Facebook, or videoconference.</td>
<td>• A coordinator for this type of program would not typically be privy to mentor-mentee discussions as these would be confidential. As a result, the overt presence of the researcher-as-facilitator would lead to a different mentoring orientation than that envisioned for this program. In addition, the development of the dyadic interactions being studied is more aligned to that of LMX theory when discussions are not facilitated than when these are facilitated. &lt;br&gt;• When the need for researcher intervention was required for the good of the organization, the pair, or the participant, the researcher placed these concerns above the goals of the research.</td>
</tr>
<tr>
<td>Monitoring</td>
<td>• Weekly online mentoring logs, consisting of a short questionnaire to assess the mentoring process and state of the relationship for that week, were requested of participants. &lt;br&gt;• Re-matching was conducted as required; the new pairs began discussions during the last two months of the study.</td>
<td>• Monitoring occurred to ensure that discussions remained respectful &lt;br&gt;• In situations where a mentor and mentee were found unable to reconcile their differences, it was decided that participants would be better served by the dissolution of the mentoring relationship (Monsour, as cited in Hobson, 2003a).</td>
</tr>
<tr>
<td>Program Component</td>
<td>Function</td>
<td>Rationale</td>
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| Mentoring Support | • To provide support to mentors and mentees should the need arise  
• Ad-hoc suggestions on how to proceed with mentoring were provided to mentors by the researcher, acting as program coordinator. Discussions involving the program coordinator were not used for research purposes. The researcher made it clear to participants when she was acting as a coordinator, rather than as a researcher, to limit potential conflicts of interest.  
• Changes in terms of research constraints or design were necessary to provide for more effective mentoring. These changes included allowing mentors and mentees to coordinate with each other through text messages, email, or Facebook. | • O’Neill and Harris (2004) state that mentors and mentees have different expectations about the character of mentoring relationships and that researchers must take these into account for more effective mentoring to occur. As a result, the researcher was to provide mentoring support when it was requested. |
| Technical Support | • To assist with technical issues relating to the mentoring environment | • Mentors and mentees were expected to experience problems that would require the help of the researcher acting as technical support. |
| Closing Session | • Portfolio reviews were conducted with mentors and mentees during the final interview. Mentees were encouraged to contact their mentors to thank them for their time. | • Bierema and Merriam (2002) advise that formal mentoring relationships “end on a positive note” (p. 222). They state that several programs have sessions that accomplish this through a summation of the mentoring experience. |

Figures 4.1, 4.2, and 4.3 are taken from the online mentoring environment, which consists of Knowledge Forum and Audio Re-searcher. Figure 4.1 displays the audio library in Audio Re-searcher. Figure 4.2 displays a pair’s mentoring discussion in Knowledge Forum, and Figure 4.3 displays the tags and notes that a mentee created in Audio Re-Searcher.
Figure 4.1. **Audio Library in Audio Re-Searcher.**

Note. All participant identifying information has been removed. The only name, sheryl, included in this figure is that of the researcher.
Figure 4.2. A mentor and mentee discussion on Knowledge Forum during the requirements-gathering study.

Note: All participant identifying information has been removed. The only name, Sheryl G., included in this figure is that of the researcher.
4.7. The Host Organization: Context

The host organization, whose identity will be kept confidential (see Research Procedures), is a local chapter of an international religious nongovernmental organization (RNGO; Berger, 2003), located in a major city of Western Canada. Its mission is to provide support for Catholics who want to participate more actively in the development of their spiritual lives. The RNGO contributes to the parish life of local dioceses as well as provides volunteers and fundraising for international missions and sustainable community projects in developing nations. In Canada, the host organization has chapters across the country. It is a voluntary organization with 25% of its membership being volunteer leaders. It has a very small full-time staff of mission workers; for instance, only two mission workers are directly responsible for the Western region of Canada, including major cities such as Regina, Calgary, Edmonton, Vancouver, and Victoria. At the time of the study, this ministry was administered by an executive leadership core group of eight volunteers. This executive team reports to two ministry coordinators from the RNGO, who volunteer to coordinate ministry activities and ensure that these are aligned with the goals of the RNGO. They provide mentoring to the
executive leadership. The ministry executive team leads 23 cell group leaders who are responsible for their respective members. A cell group is a single sex unit of approximately five to seven members. A volunteer leader of the same sex is appointed by the coordinators and ministry executive team. A cell group leader is responsible for one-to-one mentoring of members and group activities, such as conducting faith workshops and prayer meetings.

New members are recruited through participation in a program designed to deepen their understanding of the faith. This program is conducted several times throughout the year. A person who completes this program becomes an organizational member and is placed in a cell group. Participation is voluntary. The CLM was conducted in one of the several ministries operating under the RNGO. In an interview conducted with one of the ministry coordinators, I was informed that “as far as membership… about 150 [members were listed] with about 40% [of these members] inactive.” Members are considered inactive when they do not attend meetings or activities. Cell group leaders are responsible for ensuring that meetings are relevant to members, while also grooming for leadership those they view as having potential for this role.

4.7.1. Leadership development and challenge

The ministry, within which I conducted the CLM, is challenged with replacing leaders who transition into other RNGO ministries. To ensure that the host organization can find new leaders to replace those who have transitioned into other organizational ministries, it implements a leadership development program. Identification of potential leaders begins during a series of workshops that provide the main point of entry into the organization.

As previously mentioned, all members who choose to participate in the organization’s community life and service are placed in cell groups. Cell group leaders groom potential members for leadership by presenting them with opportunities to lead chapter events, programs, conferences, retreats, and workshops. They also meet with their members on a one-to-one basis to discuss a variety of topics, including how
members wish to serve within the organization. At the same time, new cell group leaders are mentored by their respective leaders within a parallel executive cell group structure. New and potential leaders participate in formal leadership development workshops and conferences.

The existence of a leadership culture was identified as a condition for success that was required to exist in an organization, in order for meaningful research about the CLM implementation to be conducted. The host organization met this criterion. Its organizational culture conceptualizes leadership as being distributed across its membership. Within this organization, leaders are conceived as being servants to those for whom they are responsible. Every member is encouraged to serve and a variety of leadership opportunities, formal and informal, exist.

During a focus group with its current executive leadership, one leader stated that every leader is expected to find and mentor his or her replacement, given that leaders are expected to be promoted through the hierarchy or transition into other ministries within the RNGO. Therefore, in addition to the coordination of regularly scheduled events, much accountability for leadership development lies in the hands of each leader. Current leaders play multiple roles within the organization, including being responsible for local administration and the implementation of conferences; workshops; assemblies; and retreats for its general membership. Thus, the existing leadership, tasked with mentoring new and potential leaders, may not have the time, experience, or depth in theological understanding needed to mentor potential and new leaders effectively.

Leadership development includes participation in a formal program of workshops and retreats. However, advanced workshops are not given to leaders on a regular basis. In some cases, cell group leaders, responsible for mentoring potential leaders, may still be in the process of learning about leadership. During a focus group, three executive leaders stated that they appreciated that the CLM mentors were seasoned leaders who could provide mentoring to new and potential leaders that was complementary to the training and support the executive provides. One of the coordinators responsible for the overall direction of this ministry expressed hope that leadership development and
succession would improve and stated, “We are praying that [the ministry] grows and more people will be empowered to take leadership.”
Chapter 5.

Research Design: Framework and Procedures

5.1. Overview

This chapter covers the design of the research study. First, the research framework for the intervention will be explained, with respect to how it relates to a design-based orientation. Second, data collection and analysis procedures will be outlined. Third, decisions promoting ethical participation, quality, trustworthiness, and the practical contribution of the study will be discussed (Barab & Squire, 2004; Clarke & Dede; 2009).

5.2. Research Framework

5.2.1. Case studies and design-based research

In this study, I explored the perceptions that mentors and mentees held about their experiences and the development of their mentoring relationships within the CLM environment. Design-based research (DBR) provided the orientation for this study; however, it is not a freestanding research methodology that prescribes particular modes of data collection and analysis. As such, I decided to use a multiple case study approach for this research. Multiple case studies enabled the exploration of case particulars and the identification of themes across cases, instrumental to understanding the complex issues of the studied phenomenon or quintain (Creswell, 2007; Stake, 2006). This approach also facilitated the in-depth exploration of participants’ complex experiences in context (Creswell, 2007; Yin, 2009), which is compatible with the DBR orientation for studying complex learning in context.
Aligned with the need to draw case boundaries (Creswell, 2007; Stake, 1995; Yin, 2009), I concluded that a mentor-mentee pair would be the most appropriate unit of analysis for understanding this phenomenon. These instrumental cases facilitated understanding of the development of mentoring relationships as supported by the program and provided insights into the nature of leadership mentoring within the virtual mentoring environment. Through the process of naturalistic generalization, these cases provide insight into the development of mentoring relationships within similar contexts (Stake, 1978; Stake, 1995). This process is made possible through rich case descriptions that highlight how various aspects of the CLM interrelated with participants’ assumptions about mentoring to shape their experiences. In this study, the emic perspective of participants (Creswell, 2007) was critical to informing my understanding of the studied phenomenon because it was they who experienced it. This convergence of perspectives provided for a systemic and in-depth understanding of the issues, challenges, and benefits that emerged within CLM, while also contributing to theory development regarding mentoring on leadership-making.

5.3. Research Procedures

5.3.1. Gaining access to entry

I obtained access to entry to the host organization as a result of my personal acquaintance with members of its leadership. In addition, I am familiar with its organizational mission, culture, and structure, as well as its leadership development program. This familiarity enabled me to integrate with its leaders and members during the planning and implementation of the CLM, as well as during the recruitment of participants. As a practicing Catholic, I was able to communicate the potential benefits of a Catholic understanding of leadership for mentees, as well as the contribution that participation in this study would make to scholarly research.

Before gaining entry, however, I obtained appropriate permission, aligned with Simon Fraser University’s protocols for conducting ethical research, from the host organization. The leaders responsible for this chapter in Western Canada signed an organizational consent form allowing the CLM to be implemented within its area and for
the research study to be conducted. An official letter confirming participation in the study was also provided to the researcher. Access to entry was thereby provided. In return, I guaranteed confidentiality with respect to the organization’s and participants’ identities when reporting the study. The CLM, from orientation sessions to the end date for mentoring discussions, was implemented from the period between May 11, 2012, and December 12, 2012.

5.3.2. Sampling

Purposeful sampling was used to select participants for the study (Creswell, 2007). Once access to entry had been gained, the host organization’s executive leadership, its ministry coordinators, and its mission worker were asked to provide a list of experienced leaders to serve as mentors. Another list of potential and new leaders was also requested from this group. Mentors and mentees were then selected from this list by the executive leadership, and they were invited to participate in the study. Greater detail on participant selection, matching, recruitment, and participation are detailed below.

Participant selection

The organization was asked to provide a list of current or past leaders who could serve as mentors in the CLM. Inclusion on the list was based upon what the executive leadership, a full-time mission worker, and the ministry coordinators perceived made good leaders, such as having a proven track record in leading others; a commitment to service; and an active and observable faith life. Mentors were recruited from those on the list and came from across Canada. All mentors had been experienced leaders within this particular ministry of the RNGO, with one still an active leader within it. Mentors included past mission workers, as well as past or existing executive ministry leaders in areas in which the RNGO has chapters.

CLM mentees came from a list of participants from the local host organization. The mentees were viewed by executive leadership to hold promise as leaders because they exhibited qualities such as “a heart for service” and regular attendance at ministry events. Although I had not requested that the list reflect diversity, the list was developed
to represent a diversity of the kinds of potential or new leaders within the chapter, such
that the current leaders considered factors as age, ethnicity, and career interests when
placing potential mentees on the list. Another criterion used by one of the executive
leaders when creating the list was whether the mentee would benefit from participating
in the workshop.

Matching

A list of eight potential mentor-mentee matches was developed. Matching
resulted in five male pairs and three female pairs. Pairs consisted of same-sex matches
in order to coincide with the culture of the host organization, wherein the members of
each sex lead their own section of the hierarchy, with the executives of each respective
section co-leading the entire group. These matches were based upon the ministry
coordinators’ insights into the compatibility of a particular mentor and mentee in terms of
their interests, age, and past leadership experience. Matches were decided upon prior to
recruiting mentors and mentees. If either mentor or mentee was not interested in
participating in the CLM, the coordinators determined another appropriate match. These
participants were subsequently invited to participate. This process was repeated until
eight matched pairs of participants were found. Details on participant recruitment are
provided in the following section.

Participant recruitment

Potential mentors were contacted by the researcher to invite them to participate
in the program. Potential mentees were contacted by the researcher after their direct
leaders had spoken with them about the CLM and the research study. Once potential
mentors and mentees agreed to participate in the CLM program, they were presented
with consent forms for participation (see Appendix C) in the related research and were
informed of the voluntary and confidential nature of participating in the research study.
Participants were assured that confidentiality would be respected and identifying
information would be removed when reporting the study. A code of conduct was included
as part of the consent form terms of agreement to ensure that the discussions remained
respectful and information kept confidential.
Participation

An examination of the eight pairs who agreed to continue participation after the orientation session revealed that four had at most one member posting to Knowledge Forum. Two other pairs had begun discussion on Knowledge Forum but did not continue past the fourth month of CLM participation. The remaining two pairs maintained discussions and continued to participate in the research process. Two mentees were re-matched with two mentors during the last two months of the CLM. Because only one pair had maintained consistent communication by the fifth month, the decision was taken to *jumpstart* discussions for the other pairs, meaning that an e-mail was sent to the pairs stating that the final two months of the CLM would commence on October 11, which was also the *re-match* start date. Pairs were asked to continue discussing the audio material until December 12, the last day of the CLM. The pair who remained consistent in their discussions kept its original end date, November 20.

Mentors ranged from 27 to 37 years of age, at the beginning of the program. The mean age of the seven mentors who provided demographic information was 32.86 years. The mean age of the eight mentees who provided this information was 27.13 years. Five men and three women participated as mentors. Mentees ranged in age from 23 to 35 years of age, at the beginning of the program. Five men and three women participated as mentees. Participants came from various ethnicities, nationalities, professions, and educational levels.

As an incentive, a $50 gift card or cash amount was to be won by three participants at the end of each of the two-month periods of the six-month CLM. Therefore, draws were to be conducted after participation at two months (T1), four months (T2), and six months (T3). Participants were informed that they would be eligible for the draw if they regularly submitted weekly logs (see Data Collection) over the two-month period. If they missed a submission during a period, they would have another opportunity to receive the incentive at T2 and T3.
Mentor participation

Eight mentors agreed to participate in the mentoring program. All eight participated in the orientation session, at the beginning of the program, and the first interview session, which was conducted two months (T1) into the six-month implementation. By the second interview session, at four months (T2), two mentors discontinued participation in the program. One of these mentors communicated with the mentee by text to coordinate communication but did not post to Knowledge Forum. Another three mentors found that their respective mentees had not posted in Knowledge Forum. Between T1 and T2, another mentor became busy with personal obligations but did not formally discontinue participation in the CLM. Interviews were conducted with the two mentors who continued to communicate with mentees.

By the third interview session, at six months (T3), interviews were conducted with four mentors. Two were from original matches; two were from re-matches. As mentioned, two mentors, who became available for re-match after their mentees discontinued participation, were re-matched with two mentees.

Mentee participation

The original eight mentees who participated in the orientation sessions included one who discontinued participation in the research study. This mentee was replaced by another mentee. During the first two months, three of the mentees only communicated with their mentors to coordinate their online communication. These mentees never participated in online discussions. Five mentees contributed to online discussions with their mentors. One of these mentees did not receive a reply to contributions in the forum but received an e-mail stating that the mentor was to be on vacation.

Five mentees participated in interviews at the end of the first two months (T1). During the next two months, three mentees had not heard from their mentors for an extended period of time. One mentor made an attempt to contact one of these mentees toward the end of this period (T2), but communication was not reestablished because of continuing scheduling conflicts. One mentee had sustained mentoring communication during this period. Three (two with no mentoring communication; one with sustained communication) participated in the interviews. Two mentees, whose communication with
their mentors had ceased, agreed to be re-matched with two available mentors for the remaining two months of the program. Four interviews were conducted with mentees (two from original matches; two from re-matches) during the third interview session (T3).

**Re-matching**

Two mentors and two mentees were re-matched to create two new mentor-mentee pairs, during the last two months of the six-month implementation. Because of confidentiality reasons, I shall provide the criteria for the re-matching without providing details as to which mentors were re-matched with mentees. The mentor re-match criteria required that mentors be available and willing to participate in the last two months of the CLM. Criteria for mentee re-match required prioritizing which mentees would benefit most from participation in the last two months of the CLM. Those mentees who had participated in Knowledge Forum discussions were given priority over those who had not posted to the forum.

I decided to re-match only those who had already agreed to participate in the program; therefore, no new mentees were recruited for CLM participation. Re-matching was also constrained by the requirement that the mentor and mentee be of the same sex. Once a potential re-match was identified, each party was invited to participate until a mentor-mentee pair was found. Using this process, two available mentor-mentee pairs agreed to participate in the CLM.

**5.3.3. Data collection**

In addition to notes that the pairs created in Knowledge Forum and Audio Re-Searcher, mentors and mentees were asked to complete weekly logs regarding the week’s activities (see Appendix D). These logs were intended to collect data on each pair’s progress through audio material, as well as to collect information on how each member of the pair perceived the mentoring relationship, mentoring exchanges, and mentoring process during the week. The weekly logs were electronically collected through a web-based survey tool hosted at Simon Fraser University. Weekly logs were collected consistently from two mentees for the period between the orientation sessions and T1. Only one mentee consistently submitted weekly logs by the end of T2. Other
participants did not contribute regularly or at all. As a result, the weekly logs were useful only for triangulation purposes when developing the cases.

Observation notes were taken during the orientation sessions, while semi-structured interviews with individual participants were conducted at approximately two months (T1), four months (T2), and six months (T3). Eight mentors and five mentees participated in the interview process at T1. At T2, the one mentor and three mentees who continued to participate were interviewed. At T3, all the remaining pairs, consisting of four mentors and four mentees, were interviewed. Interviews ranged in time from 7 to 58 minutes. The average length of time for an interview was approximately 30 minutes. The interview questions explored participants’ expectations of the program, the nature of the mentoring relationships supported by the program, challenges, and benefits (see Appendix E). Although attempts had been made to interview all participants, not all participated. Altogether, 25 interviews were conducted.

Portfolios were to be collected from mentors and mentees at the end of the program. These portfolios were to consist of notes that individuals had deemed significant to each one’s respective mentoring experience. However, only two participants individually reviewed their notes and identified those to be included in their portfolios. To collect this data, the researcher set aside a portion of the T3 interview for a portfolio review, during which the participants reviewed and identified notes they found significant. All were then asked to explain what they found significant about these particular notes.

In addition, participants were asked to complete pre-implementation and post-implementation questionnaires. The questionnaires were developed for the following purposes: 1) to help identify high-quality relationships or ones that could provide meaningful insights into how relationships developed within the mentoring environment; 2) to collect demographic information on participants; and 3) to see how mentees’ attitudes toward leadership changed after the implementation.

Questionnaires were submitted for expert review prior to administration and think-aloud interviews with two participants (one mentor and one mentee) from the requirements-gathering study were used to refine the questions designed by the
researcher. Demographic items on the surveys included age, sex, religion, marital status, profession, nationality, and ethnicity. The survey also incorporated measures for the quality of the leader-member exchange (Liden & Maslyn, 1998), as exemplified in Bang’s (2011) study on volunteer leaders’ and members’ job satisfaction and their intention to stay in a nonprofit sports organization. The questionnaire developed by Liden & Maslyn includes four dimensions: These are affect, loyalty, contribution, and professional respect. Three items measure each dimension, resulting in twelve items in total. Intention to stay, willingness to lead, preparation for leadership, leadership self-perception, and the desire to see others lead were also measured using statements on a seven-point scale from strongly disagree to strongly agree. The Simon Fraser University Web Survey tool was used to administer all questionnaires (see Appendix F).

Eight responses for the pre-questionnaire were collected from mentees during the first two weeks of the implementation. Eight mentors responded to the pre-questionnaire during the same time period. The two mentors and two mentees who had been re-matched were asked to fill out the pre-questionnaire again; two mentors and one mentee responded to the request. For post-questionnaires, three mentees and four mentors responded to the questionnaire.

Less data were collected from fewer participants than originally anticipated. Because only four mentor-mentee pairs completed the program, these four cases were easily identified as ones on which data analysis should focus. Further, another three pairs provided data that were useful for the purposes of the study, resulting in a total of seven pairs identified as cases. As a result, little need existed for analyzing the questionnaire for its first purpose of identifying cases of interest for data analysis. In addition, the pre- and post-implementation comparison was not conducted, given that only three pre- and post-questionnaires could be matched. This small sample size limits the kinds of inferences that can be made; therefore, the data collected from questionnaires were more appropriately used as a means for triangulating findings obtained from the interviews.

Through the examination of organizational documents, data were collected about the host organization, such as information about existing leadership development
initiatives. Organizational leaders were also asked to participate in a group interview (see Appendix G for protocol) and a focus group (see Appendix H for protocol), which yielded insights regarding the selection criteria that had been used to identify mentors and mentees for inclusion in the program. These data provided important context for interpreting the findings about the individual mentoring relationships. The semi-structured group interview was conducted with the ministry coordinators, and the semi-structured focus group was conducted with three of the eight executive ministry leaders who had helped select participants for the CLM. Combined with the participant interviews and other data collected, I was able to analyze data that would provide for an in-depth description of the cases used in the study.

5.3.4. Data analysis

A multiple case-study approach was used for data analysis (Stake, 2006). I analyzed the collection of mentor-mentee cases being studied to explore how mentoring relationships were fostered by and experienced within the program. Only those mentor-mentee pairs in which both parties participated in the interview sessions were included in the data analysis. Seven mentor-mentee pairs, which included the two re-matched pairs, were identified as cases.

An iterative process of data collection and analysis was used. During this process, I reflected upon the data collected by writing notes or memos. Since it was through these memos that I reflected upon the research process and data collected, memoing was in itself a form of data analysis. This reflection informed how I would conduct the next round of data collection and the kinds of questions I would ask during it. In addition, these memos were useful in facilitating recognition of potential questions, categories, and themes that might emerge over the course of the study.

Interviews, which included the portfolio review, provided the foundation for the data analysis. Interviews were transcribed, and decisions with respect to the representational aspects of transcription were made (Oliver, Serovich, & Mason, 2005). I decided to transcribe the interviews in a manner that kept the voices of the participants authentic; therefore, I included utterances, slang, and idiosyncratic patterns of speech.
This decision facilitated my ability to interpret participants’ responses to my questions. During reporting, edits were made to transcript quotations to protect participant identity or increase reader comprehension. These edits have been made explicit to the reader in the case reports.

Hand coding was used to analyze interviews because it enabled my analysis to remain close to the data and ensured that the text, not software, drove the development of the codes (Martin, 2008). Hand coding also helped me to focus on the details of a case, while more easily providing a comprehensive view of the data collected, because it required that I document all decisions regarding coding through the use of notes and memos.

Becoming aware of shifts in analysis, from the individual case level to that of the collection of cases, is critical when working with multiple cases (Stake, 2006). The coding and memoing processes prompted me to conceptualize how emerging codes could be organized in reference to the whole collection of data. Each individual case was examined for its own particularities with regard to mentor and mentee experiences. However, I had to keep in mind how these individual cases could collectively inform my understanding of issues that contributed to cross-case perceptions within the CLM.

Stake (2006) refers to this as the “case-quintain dilemma” (p. 7), wherein the quintain refers to the collection of cases bound together by the issue or phenomenon being explored. Stake (2006) states that “[t]he ultimate question shifts from ‘What helps us understand the case?’ toward ‘What helps us understand the quintain?’” (p. 6) Thus, in addition to facilitating recognition of emerging themes during data analysis, coding and memoing facilitated these shifts in focus, from the case to the quintain, because I was required to be explicit in my memos as to when, how, why, and where my focus would shift. Concurrent to the analysis of the particulars of each individual case, potential relationships among themes that emerged in individual cases and those that might provide insights into the cross-case analysis were noted in memos. The full cross-case analysis was approached with these memos in mind.

Data analysis involved categorical aggregation of experiences and perceptions that were coded within each and across cases, as well as the direct interpretation of
single instances that emerged within each case (Creswell, 2007; Stake, 1995; Stake 2006). Each case was analyzed with respect to how the mentor and mentee viewed aspects of interest to this study; these were beliefs about mentoring and technology, expectations, challenges, benefits of participation, and experiences in the program. I developed in vivo codes with these aspects of interest in mind, while remaining open to emergent categories and themes. The analysis was first conducted within the context of the mentor-mentee pair, with the mentor’s and mentee’s views juxtaposed against each other. This same process was conducted for each successive individual pair.

After the single case analysis, I began the cross-case analysis to identify themes and issues relevant to understanding the quintain and the design of the CLM. During this analysis, I noticed patterns among cases that led to the emergence of three main case groupings. These groupings were based upon the pairs’ CLM participation and perceptions relating to their mentoring experiences. I refer to these three case groupings as discontinued relationships, challenging relationships, and complementary relationships. Discontinued relationships were those wherein discussions never began or were discontinued because of a lack of response from at least one member of the pair. This group consisted of two of the seven cases. In these two cases, the mentors discontinued participation in the CLM. The challenging relationships consisted of pairs, whose experiences were typified by attempts to overcome mentoring challenges, including scheduling conflicts; these comprised of two cases. The complementary relationships consisted of three pairs, including both re-matched pairs, who perceived their experiences as generally positive and their interactions as smooth. Cross-case analysis was first conducted for each case grouping. Then, cross-case analysis was conducted across these three groupings. Findings from interviews were triangulated with data from logs, questionnaires, observations, focus groups, and group interview. Chapter 6: Preface for Individual Cases provides more information on the initial analysis, its findings, and how these influenced decisions that led to the emergence of each of the above groupings. Table 5.1 provides a summary of the groupings, participation, and included cases for this study.
Table 5.1. Summary of the Kinds of Relationships, Pairs, and Cases Included in the Analysis

<table>
<thead>
<tr>
<th>Mentor-Mentee Pair</th>
<th>Case</th>
<th>Re-Match</th>
<th>Kind of Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pair 1</td>
<td>--</td>
<td>No</td>
<td>Discontinued</td>
</tr>
<tr>
<td>Pair 2</td>
<td>--</td>
<td>No</td>
<td>Discontinued</td>
</tr>
<tr>
<td>Pair 3</td>
<td>--</td>
<td>No</td>
<td>Discontinued</td>
</tr>
<tr>
<td>Pair 4</td>
<td>Analyzed</td>
<td>No</td>
<td>Discontinued</td>
</tr>
<tr>
<td>Pair 5</td>
<td>Analyzed</td>
<td>No</td>
<td>Discontinued</td>
</tr>
<tr>
<td>Pair 6</td>
<td>Analyzed</td>
<td>No</td>
<td>Challenging</td>
</tr>
<tr>
<td>Pair 7</td>
<td>Analyzed</td>
<td>No</td>
<td>Challenging</td>
</tr>
<tr>
<td>Pair 8</td>
<td>Analyzed</td>
<td>No</td>
<td>Complementary</td>
</tr>
<tr>
<td>Pair 9</td>
<td>Analyzed</td>
<td>Yes</td>
<td>Complementary</td>
</tr>
<tr>
<td>Pair 10</td>
<td>Analyzed</td>
<td>Yes</td>
<td>Complementary</td>
</tr>
</tbody>
</table>

5.3.5. Ensuring ethical conduct

I obtained ethical approval from Simon Fraser University’s Office of Research Ethics to ensure that the study was conducted in accordance with the standards set by the academic community. The study was classified as posing minimal risk. Informed consent was obtained from mentors, mentees, and the host organization. A code of conduct was developed to maintain the integrity of the mentor-mentee discussions and interactions. While I did not directly facilitate these discussions, I was privy to viewing the discussions and could intervene should their tone or direction veer away from that specified in the code.

Confidentiality was guaranteed to the extent that all participants followed the code of conduct. Anonymity, during the reporting of the study, was ensured through the use of pseudonyms and the removal of identifying information specific to the organization or participants. In addition, I refer to the participants by their roles and pair number. For instance, the mentor and mentee who belong to Pair 4 are referred to as Mentor 4 and Mentee 4. Because of the small sample size and the use of member checking, which will be discussed in an upcoming section, the decision was made to make no reference to the sex of the participants, since the participants had themselves been informed as to the identity of the other participants of the CLM. I shall refer to all
the participants in the masculine form, such as “he” and “him”, although both men and women participated in the study. While I indicated Pairs 9 and 10 as re-matched pairs, I did not specify which mentors and mentees from the original matches were re-matched to guarantee confidentiality in reporting. All participants were guaranteed the right to withdraw from the study without consequence. All data has been stored on password-protected databases hosted on servers in Canada.

**Researcher roles and conflict of interest in design-based research**

During the course of the study, I played the roles of program designer, coordinator, and researcher. These roles were explained to participants. I made evident to participants the role I was playing at a particular time. Decisions were made in favour of the organization, pair, or participant during situations in which the needs of the organization or pair were at odds with those of the study. In addition, the decision was made not to collect data when I was playing the role of coordinator.

### 5.3.6. Ensuring quality and trustworthiness of data

Data were triangulated across multiple data sources, methods, and perspectives to ensure that the analysis provided credible, rich, and trustworthy findings (Creswell, 2007). Thick description and procedural decisions were included in the reporting of this study to enable readers to assess the transferability of these findings to their own situations (Creswell, 2007). A frame interview (S. Carliner, personal communication, March 15, 2014; see Appendix I) was conducted by Fiona Mackellar, a doctoral student not involved with this study. This interview provided for researcher reflexivity and makes evident to readers my subjectivities and biases. Awareness of these subjectivities, in turn, informed how I conducted this study and analyzed data (Peshkin, 1988). It also enabled me to examine my own interpretations of the data in light of these subjectivities, which sensitized me to potential ways in which my view of the cases could be expanded to include other perspectives. In addition, member checking was conducted with participants to enhance the dependability of my description of participants’ experiences and to confirm that my interpretations of their perspectives were perceived by them to be a credible representation and interpretation of their experiences.
Given that design-based research has both theoretical and applied goals, an important quality criterion that influenced this study’s design was that the intervention should lead to practical contributions in the field (Barab & Squire, 2004). For this reason, design decisions involved issues relating to practical utility, such as taking into consideration conditions necessary for the CLM’s success (Clarke & Dede, 2009). Future iterations of this program will reflect similar considerations by which the aims of theoretical contributions and practical utility are negotiated. Implications of the findings for the re-design and implementation of future iterations of the CLM are discussed in Chapter 9. A general discussion of future research will be discussed in Chapter 10.

Periodic meetings with my supervisor, Dr. Kevin O’Neill, also contributed to the trustworthiness and quality of this research. Our discussions furthered reflection on the conceptualization of this study and provided me with alternative perspectives on the findings. In essence, our discussions provided for a triangulation of perspectives and enhanced my understanding of the kinds of limitations and opportunities that exist for this line of research.
Preface for Individual Cases: Initial Findings and the Emergence of Case Groupings

6.1. Overview

In Chapter 5, I provided details on the procedures that I used in the study. Here, I provide further detail on the analysis of the individual cases. I also explain how these findings influenced the cross-case analysis and the selection of cases for inclusion in this thesis. In this preface, I first provide details on the analysis of individual cases. I also discuss events, during the CLM implementation, that have bearing upon the data analysis. Then, profiles of each mentor-mentee pair who participated in the CLM will be provided. I also describe the emergence of three case groupings and explain the selection process for the cases to be reported in Chapter 7: Individual Case Descriptions and Themes.

6.2. The Cases

Aligned with Stake’s (2006) approach to multicase study, I began my analysis by exploring each single case to understand emergent issues particular to each one. Single cases were analyzed in depth “to learn about their self-centering, complexity, and situational uniqueness.” (Stake, 2006, p. 6) Each case became instrumental to understanding the quintain or phenomenon that binds the collection of cases together (Stake, 2006). As explained in the research procedures section, individual mentor and mentee dyads formed bounded cases within the context of the CLM. Each of these dyads was studied individually to explore perceptions about the mentoring experience
and uncover those issues that hindered or forwarded the development of the mentoring relationship, as perceived by a mentor-mentee pair.

While issues that emerge within a single case may not be directly related to the quintain, these issues contribute to conceptualizing the studied phenomenon in ways that become more evident during cross-case analysis (Stake, 2006). To facilitate cross-case analysis, I began writing memos while analyzing each single case. In these memos, I noted reflections or ideas that could be relevant to understanding the quintain, although the quintain was not the focus of the analysis at this point in time.

The aim of this chapter is to provide details for understanding how I selected the cases presented in Chapter 7. Each case represents one of three categories of cases found within the broader context of the CLM. The cross-case analysis will be presented in Chapter 8.

### 6.3. Profiles of Mentor-Mentee Pairs

Out of the ten pairs who agreed to participate in the CLM, data from seven pairs could be used for analysis. For the other three cases, at least one member of the pair did not participate in the interview process; thus, essential data for case inclusion were not available. Pairs 4 to 10, therefore, became the cases studied for this research.

A profile for each pair will be presented in this section. This profile includes the participants’ leadership experience within the RNGO; however, no leadership information will be provided for re-matched mentors and mentees for confidentiality reasons. When possible, I also include the number of Knowledge Forum notes posted by participants. The profiles for the case pairs provide the orientation session dates, as well as CLM start or re-match dates. A jumpstart, prompting participating pairs to resume discussions, was necessary because only one pair was communicating regularly by T2. The jumpstart date provided in the case profiles refers to the assigned date by which pairs were to resume discussing topics in Knowledge Forum. A CLM end date has been provided for the four pairs who expressed their intention to continue their participation past T2.
Though this study does not focus directly on the notes exchanged by mentors and mentees, descriptions of the number of exchanges, note characteristics, and kind of note provide insight into and context for each pair’s mentoring relationship. For all case pairs, I provide tables (Tables 6.1 to 6.7) describing when notes were written and their characteristics to give the reader a sense of the online communication experienced by each of the seven pairs.

6.3.1. Participant pairs

The following pairs participated in the study, but they were not included as case pairs.

Mentor-mentee pair 1

The profile for Pair 1 is as follows:
- *Mentor 1’s leadership profile:* Former executive ministry leader; served in other ministries in RNGO
- *Mentee 1’s profile:* New leader; concerned about balancing CLM with other priorities
- Number of notes (not including notes from orientation training): 1 note posted by mentor

Mentor-mentee pair 2

The profile for Pair 2 is as follows:
- *Mentor 2’s leadership profile:* Former executive ministry leader; served in other ministries in RNGO
- *Mentee 2’s leadership profile:* New leader; interested in learning about Catholic leadership; served in other ministries in RNGO
- Number of notes (not including notes from orientation training): No notes posted
Mentor-mentee pair 3

The profile for Pair 3 is as follows:

• Mentor 3’s leadership profile: Former executive ministry leader; served in other ministries in RNGO
• Mentee 3’s leadership profile: New leader; concerned about time needed to serve as a leader
• Number of notes (not including notes from orientation training): 1 note posted by mentor

6.3.2. Case pairs

The following are the profiles for the cases analyzed for this study.

Mentor-mentee pair 4

The profile for Pair 4 is as follows:

• Mentor 4’s leadership profile: Former mission worker; served in other ministries in the RNGO
• Mentee 4’s leadership profile: Potential leader; interested in learning more about Catholic leadership and how it can be applied in one’s daily and professional lives
• Orientation session: May 18
• CLM start date: May 27
• Number of notes (not including notes from orientation training): 2 notes posted by mentee

Table 6.1. Notes Exchanged by Pair 4 After the Orientation Session

<table>
<thead>
<tr>
<th>Note Date</th>
<th>Kind of Note</th>
<th>Mentor 4</th>
<th>Mentee 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>06.14.2012</td>
<td>--</td>
<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>06.25.2012</td>
<td>--</td>
<td></td>
<td>Discussion</td>
</tr>
</tbody>
</table>

Note: Each note was classified as a discussion or coordination note. A discussion note refers to communication about the topic being discussed. A coordination note refers to communication on how to approach the task.
**Mentor-mentee pair 5**

The profile for Pair 5 is as follows:

- *Mentor 5’s leadership profile:* Former ministry leader; served in other ministries in the RNGO

- *Mentee 5’s leadership profile:* Potential leader; wanted to learn more about Catholic leadership to help him in his decision to accept leadership; concerned about the level of theological understanding needed to be a ministry leader

- Orientation session: May 11

- CLM start date: May 20

- *Number of notes (not including notes from orientation training):* 13 notes in total (5 notes posted by mentor; 8 notes posted by mentee)
Table 6.2. Notes Exchanged by Pair 5 After the Orientation Session

<table>
<thead>
<tr>
<th>Note Date</th>
<th>Kind of Note</th>
<th>Mentor 5</th>
<th>Mentee 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>05.11.2012</td>
<td></td>
<td>--</td>
<td>Coordination</td>
</tr>
<tr>
<td>05.18.2012</td>
<td>Coordination</td>
<td></td>
<td>--</td>
</tr>
<tr>
<td>05.18.2012</td>
<td></td>
<td>--</td>
<td>Coordination</td>
</tr>
<tr>
<td>05.28.2012</td>
<td>Coordination</td>
<td></td>
<td>--</td>
</tr>
<tr>
<td>05.29.2012</td>
<td></td>
<td>--</td>
<td>Coordination</td>
</tr>
<tr>
<td>05.29.2012</td>
<td></td>
<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>06.05.2012</td>
<td></td>
<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>06.08.2012</td>
<td>Coordination</td>
<td></td>
<td>--</td>
</tr>
<tr>
<td>06.08.2012</td>
<td>Discussion</td>
<td></td>
<td>--</td>
</tr>
<tr>
<td>06.17.2012</td>
<td></td>
<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>07.25.2012</td>
<td>Discussion</td>
<td></td>
<td>--</td>
</tr>
<tr>
<td>07.25.2012</td>
<td>Coordination</td>
<td></td>
<td>--</td>
</tr>
<tr>
<td>08.14.2012</td>
<td></td>
<td></td>
<td>Coordination</td>
</tr>
<tr>
<td>08.19.2012</td>
<td></td>
<td></td>
<td>Discussion</td>
</tr>
</tbody>
</table>

Note: A note was classified as both a discussion and coordination note when both kinds of communication were present.
**Mentor-mentee pair 6**

The profile for Pair 6 is as follows:

- **Mentor 6’s leadership profile:** Former mission worker; served in other ministries in the RNGO
- **Mentee 6’s leadership profile:** New leader; has experience as a Catholic leader in another context; interested in learning more about Catholic leadership
- Orientation session: May 24
- CLM Start date: May 27
- **Number of notes (not including notes from orientation training):** 9 notes in total (4 notes posted by mentor; 5 notes posted by mentee)

### Table 6.3. Notes Exchanged by Pair 6 After the Orientation Session

<table>
<thead>
<tr>
<th>Note Date</th>
<th>Kind of Note</th>
<th>Mentor 6</th>
<th>Mentee 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>05.27.2012</td>
<td>--</td>
<td></td>
<td>Coordination</td>
</tr>
<tr>
<td>05.28.2012</td>
<td>Coordination</td>
<td></td>
<td>--</td>
</tr>
<tr>
<td>06.03.2012</td>
<td>--</td>
<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>06.14.2012</td>
<td>--</td>
<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>06.19.2012</td>
<td>Discussion</td>
<td></td>
<td>--</td>
</tr>
<tr>
<td>06.19.2012</td>
<td>Discussion</td>
<td></td>
<td>--</td>
</tr>
<tr>
<td>06.21.2012</td>
<td>--</td>
<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>06.21.2012</td>
<td>--</td>
<td></td>
<td>Personal (unrelated to task)</td>
</tr>
<tr>
<td>07.23.2012</td>
<td>Coordination</td>
<td></td>
<td>--</td>
</tr>
</tbody>
</table>

*Note: Personal (unrelated to task) refers to off-task communication relating to a personal issue, such as a personal question or revelation.*
Mentor-mentee pair 7

The profile for Pair 7 is as follows:

- **Mentor 7’s leadership profile**: Executive ministry leader; served in other ministries of the RNGO

- **Mentee 7’s leadership profile**: Potential leader; has served in other ministries in the RNGO; has concerns about ability to meet the standards expected of leadership; interested in the topic of Catholic leadership, especially whether one can be a Catholic leader in non-Catholic settings such as the workplace

- Orientation session: May 11

- CLM start date: May 20

- CLM jumpstart date: October 11

- CLM end date: December 12

- **Number of notes (not including notes from orientation training)**: 10 notes in total (5 notes posted by mentor; 5 notes posted by mentee)
<table>
<thead>
<tr>
<th>Note Date</th>
<th>Kind of Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>05.16.2012</td>
<td>Discussion</td>
</tr>
<tr>
<td></td>
<td>Coordination</td>
</tr>
<tr>
<td>05.18.2012</td>
<td>--</td>
</tr>
<tr>
<td>05.24.2012</td>
<td>--</td>
</tr>
<tr>
<td>05.28.2012</td>
<td>Discussion</td>
</tr>
<tr>
<td></td>
<td>Coordination</td>
</tr>
<tr>
<td>06.08.2012</td>
<td>--</td>
</tr>
<tr>
<td>10.18.2012</td>
<td>--</td>
</tr>
<tr>
<td>10.21.2012</td>
<td>Discussion</td>
</tr>
<tr>
<td>10.21.2012</td>
<td>--</td>
</tr>
<tr>
<td>11.02.2012</td>
<td>--</td>
</tr>
<tr>
<td>12.11.2012</td>
<td>Discussion</td>
</tr>
<tr>
<td></td>
<td>--</td>
</tr>
</tbody>
</table>
Mentor-mentee pair 8

The profile for Pair 8 is as follows:

• **Mentor 8’s leadership profile**: Former mission worker; served in other ministries in the RNGO

• **Mentee 8’s leadership profile**: New leader; has questions about Catholic leadership and faith; has difficulty perceiving himself as a leader; wants to learn about Catholic leadership

• Orientation session: May 18

• CLM start date: May 20

• CLM end date: November 20

• *Number of notes (not including notes from orientation training)*: 18 notes posted in total (11 notes posted by mentor; 7 notes posted by mentee)
<table>
<thead>
<tr>
<th>Note Date</th>
<th>Kind of Note</th>
<th>Mentor 8</th>
<th>Mentee 8</th>
</tr>
</thead>
<tbody>
<tr>
<td>05.23.2012</td>
<td>Coordination</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mentoring Approach</td>
<td></td>
<td></td>
</tr>
<tr>
<td>05.23.2012</td>
<td>Discussion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>05.26.2012</td>
<td>--</td>
<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>05.29.2012</td>
<td>Discussion</td>
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<tr>
<td>05.31.2012</td>
<td>--</td>
<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>06.03.2012</td>
<td>Discussion</td>
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<tr>
<td>06.03.2012</td>
<td>Discussion</td>
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<tr>
<td>06.05.2012</td>
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<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>06.11.2012</td>
<td>Discussion</td>
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</tr>
<tr>
<td>06.11.2012</td>
<td>Discussion</td>
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<tr>
<td>06.13.2012</td>
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<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>06.21.2012</td>
<td>--</td>
<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>08.26.2012</td>
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<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>08.28.2012</td>
<td>Discussion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08.28.2012</td>
<td>Discussion</td>
<td></td>
<td></td>
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<tr>
<td>09.08.2012</td>
<td>--</td>
<td></td>
<td>Discussion</td>
</tr>
<tr>
<td>09.25.2012</td>
<td>Discussion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09.25.2012</td>
<td>Discussion</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Note: Mentoring approach refers to communication that explicitly discusses the direction of the mentoring experience.

**Mentor-mentee pair 9**

The profile for Pair 9 is as follows:
- Mentor profile: Re-match
- Mentee profile: Re-match
- Orientation session: October 11
- CLM Re-match date: October 11
- CLM End date: December 12
- *Number of notes (not including notes from orientation training):* 7 notes in total (4 notes posted by mentor; 3 notes posted by mentee)

<table>
<thead>
<tr>
<th>Table 6.6. Notes Exchanged by Pair 9 After the Orientation Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kind of Note</td>
</tr>
<tr>
<td>Note Date</td>
</tr>
<tr>
<td>------------</td>
</tr>
<tr>
<td>10.12.2012</td>
</tr>
<tr>
<td>10.14.2012</td>
</tr>
<tr>
<td>10.15.2012</td>
</tr>
<tr>
<td>10.28.2012</td>
</tr>
<tr>
<td>11.09.2012</td>
</tr>
<tr>
<td>11.22.2012</td>
</tr>
<tr>
<td>12.12.2012</td>
</tr>
</tbody>
</table>

Note: Parting Advice is communication used by the mentor to impart leadership suggestions for the mentee to consider after the CLM ends.
Mentor-mentee pair 10

The profile for Pair 10 is as follows:

• Mentor profile: Re-match
• Mentee profile: Re-match
• Orientation session: October 11
• CLM Re-match date: October 11
• CLM End date: December 12
• Number of notes (not including notes from orientation training): 10 notes in total (5 notes posted by mentor; 5 notes posted by mentee)
Table 6.7. Notes Exchanged by Pair 10 After the Orientation Session

<table>
<thead>
<tr>
<th>Note Date</th>
<th>Mentor 10</th>
<th>Mentee 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.21.2012</td>
<td>--</td>
<td>Coordination</td>
</tr>
<tr>
<td>10.21.2012</td>
<td>Discussion</td>
<td>--</td>
</tr>
<tr>
<td>10.30.2012</td>
<td>--</td>
<td>Discussion</td>
</tr>
<tr>
<td>11.02.2012</td>
<td>Discussion</td>
<td>--</td>
</tr>
<tr>
<td>11.04.2012</td>
<td>--</td>
<td>Discussion</td>
</tr>
<tr>
<td>11.06.2012</td>
<td>Discussion</td>
<td>--</td>
</tr>
<tr>
<td>11.09.2012</td>
<td>--</td>
<td>Discussion</td>
</tr>
<tr>
<td>11.19.2012</td>
<td>Discussion</td>
<td>--</td>
</tr>
<tr>
<td>11.23.2012</td>
<td>--</td>
<td>Discussion Coordination</td>
</tr>
<tr>
<td>11.27.2012</td>
<td>Coordination</td>
<td>--</td>
</tr>
</tbody>
</table>

Table 5.8 provides an overview of the online exchange for the seven case pairs. A detailed exploration of the mentoring dynamics for three cases is presented in Chapter 6.
<table>
<thead>
<tr>
<th>Case Pair</th>
<th># of Notes</th>
<th>Words per Note</th>
<th>Sentences per Note</th>
<th>Kinds of Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>M</td>
<td>SD</td>
<td>M</td>
</tr>
<tr>
<td>Pair 4</td>
<td>Mentor 4</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Mente 4</td>
<td>2</td>
<td>208.00</td>
<td>80.61</td>
</tr>
<tr>
<td>Pair 5</td>
<td>Mentor 5</td>
<td>5</td>
<td>69.20</td>
<td>65.17</td>
</tr>
<tr>
<td></td>
<td>Mente 5</td>
<td>8</td>
<td>75.75</td>
<td>39.93</td>
</tr>
<tr>
<td>Pair 6</td>
<td>Mentor 6</td>
<td>4</td>
<td>326.00</td>
<td>247.82</td>
</tr>
<tr>
<td></td>
<td>Mente 6</td>
<td>5</td>
<td>335.60</td>
<td>315.97</td>
</tr>
<tr>
<td>Pair 7</td>
<td>Mentor 7</td>
<td>5</td>
<td>292.40</td>
<td>175.55</td>
</tr>
<tr>
<td></td>
<td>Mente 7</td>
<td>5</td>
<td>121.80</td>
<td>32.81</td>
</tr>
<tr>
<td>Pair 8</td>
<td>Mentor 8</td>
<td>11</td>
<td>325.82</td>
<td>142.25</td>
</tr>
<tr>
<td></td>
<td>Mente 8</td>
<td>7</td>
<td>217.86</td>
<td>65.15</td>
</tr>
<tr>
<td>Pair 9</td>
<td>Mentor 9</td>
<td>4</td>
<td>345.50</td>
<td>233.44</td>
</tr>
<tr>
<td></td>
<td>Mente 9</td>
<td>3</td>
<td>279.00</td>
<td>55.18</td>
</tr>
<tr>
<td>Pair 10</td>
<td>Mentor 10</td>
<td>5</td>
<td>93.40</td>
<td>66.28</td>
</tr>
<tr>
<td></td>
<td>Mente 10</td>
<td>5</td>
<td>113.00</td>
<td>62.05</td>
</tr>
</tbody>
</table>
6.4. The Emergence of Case Groupings

As mentioned in Chapter 5, three case groupings emerged during the analysis. The three groupings were based on 1) patterns of participation in the CLM; and 2) how a mentor and mentee perceived their participation in relation to each other and the mentoring environment. I classified the three case groupings as discontinued relationships, challenging relationships, and complementary relationships. Discontinued relationships were those in which one or both members of the pair ceased to communicate with each other and, in effect, discontinued participation in the mentoring relationship. In these cases, at least one member of the pair perceived the mentoring environment as not being conducive to mentoring, as they understood it. Challenging relationships were those in which the pairs found aspects of the mentoring experience challenging but expressed a willingness to continue the relationship. In addition, these pairs found their experience in the relationship and mentoring environment to be different from what they had expected. Complementary relationships were those in which the mentor and mentee in each pair found their experiences within the mentoring environment and with each other to be aligned with their expectations.

The following tables (Table 6.9; Table 6.10; Table 6.11) present data, from observations of Knowledge Forum discussions; interviews; and weekly logs, providing support for the three case groupings. These groupings informed the selection of individual cases to be reported in depth.
<table>
<thead>
<tr>
<th>Pair</th>
<th>CLM Participation</th>
<th>Mentoring Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pair 4</td>
<td>- Only mentee posted in Knowledge Forum &lt;br&gt;- Mentor and mentee discontinued participation in the interview process at T2</td>
<td>- Mentor found that the environment did not provide sufficient information to help the mentor establish a connection with the mentee. The mentor stated, “I’ve mentored completely differently before…I don’t have that emotional connection…because I just see…the screen.” &lt;br&gt;- Mentor did not know how to reestablish the relationship after not having responded notes &lt;br&gt;- Mentee was not certain that the mentor was willing to continue participating in the CLM</td>
</tr>
<tr>
<td>Pair 5</td>
<td>- Both mentor and mentee posted in Knowledge Forum &lt;br&gt;- Mentor discontinued participation in the interview process at T2 &lt;br&gt;- Mentee participated in the interview process at T1 and T2 &lt;br&gt;- Mentee was willing to continue participation, but did not hear from the mentor after a certain period of time</td>
<td>- Mentor found the environment “too slow” to build the kind of relationship needed to mentor someone effectively &lt;br&gt;- Mentor was not certain that the mentoring environment was compatible with the mentoring approach that this mentor uses &lt;br&gt;- Mentee was not certain to what degree the virtual environment could foster a relationship &lt;br&gt;- Mentee was not certain that the mentor would want to continue participating in the CLM</td>
</tr>
</tbody>
</table>
Table 6.10. Challenging Relationship Grouping Based Upon CLM Participation and Perceptions About Mentoring Experience

<table>
<thead>
<tr>
<th>Pair</th>
<th>CLM Participation</th>
<th>Mentoring Experience</th>
</tr>
</thead>
</table>
| Pair 6 | • Both mentor and mentee posted in Knowledge Forum  
• Sustained communication continued between May and June  
• Mentor and mentee did not participate in the interview process at T2  
• Mentor became busy with personal obligations  
• Mentor and mentee both responded positively to the call to continue participation for the remaining two months of the CLM. However, by the time the mentor responded to the request and had the time to participate more fully in the CLM, the mentee was no longer available | • Mentor felt that the environment was challenging in terms of guiding the conversation towards discussion about leadership within the community  
• Mentor found mentoring in the environment more challenging than expected. The mentor stated, “I was thinking that we would be able to find our own rhythm without having to impose some structure.”  
• Mentee found the mentoring environment challenging because it did not match his “learning style”  
• Mentee felt that the relationship was going well, but was uncertain as to why the mentor had not replied |
| Pair 7 | • Participation throughout the CLM, but with a period without communication between June and October  
• Mentor participated in interviews at T1, T2, and T3  
• Mentee participated in interviews at T1 and T3  
• Mentor and mentee continued participation in the CLM after discussions with the researcher-as-coordinator  
• The pair began posting new notes in October and continued until the end of the CLM | • At T1, the mentor found it challenging “to let the mentee own their journey without obligating them to report back...in a particular way.”  
• Mentor found it challenging to delve more deeply into topics within the environment, especially after lengthy periods of time would elapse between notes  
• Mentor found it challenging to establish a communication pattern. At T3, the mentor stated, “We didn’t have a rhythm even towards the end.”  
• Mentor found it difficult to gauge the mentee’s reaction to his approach and felt their relationship had not yet been well established at T3  
• Mentor believes that virtual mentoring is possible, but wonders about the viability of a stand-alone platform, such as Knowledge Forum, when social media and smartphones provide for a more “in your face” kind of communication  
• Mentee found the environment “challenging” because one had to open oneself up to “some random person”, but felt the effort was worth gaining perspectives from a mentor |
Table 6.11. Complementary Relationship Grouping Based Upon CLM Participation and Perceptions About Mentoring Experience

<table>
<thead>
<tr>
<th>Pair</th>
<th>CLM Participation</th>
<th>Mentoring Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pair 8</td>
<td>Mentor and mentee participated in sustained communication from May to September, except for the month of July. Mentor participated in the interview process at T1 and T3. Mentee participated in interviews (T1, T2, T3). At T3, mentee had listened to audio material during the final two months, but did not have time to post because the mentee had now come to experience the “busy” part of leadership. Upon learning that the mentee had become busy with service opportunities and did not have the time to post to the forum, the mentor stated, “Praise God.”</td>
<td>Mentor did not believe that the virtual environment made a difference in terms of how he approached building relationships. The mentor stated, “I don’t see a difference.” Mentor found the mentoring rewarding. Mentor felt “comfortable” with his mentor and found the orientation session “helped a lot” because the mentor was “smiling, laughing…joking.” Mentee saw the mentor as an example and stated, “Now, it’s my turn to be like [my mentor].” Mentor and mentee both stated that they developed a communication plan that helped them to know when the other had posted.</td>
</tr>
<tr>
<td>Pair 9</td>
<td>Re-match for the last two months of the program. Mentor and mentee contributed notes to the discussion from October to December. Mentor and mentee participated in individual interviews at T3.</td>
<td>Mentor stated, “[The mentoring] took off really fast. And it was just like, ‘Wow, this is really neat,’ and… it makes me smile because…we only had two months—probably, if you read [our notes], [you would think] these guys have known each other for a while…. we were both able to really go in pretty deep, through writing.” Mentor believes the virtual environment makes it easier to “divulge something really private and personal…like you’re confessing something…You never want to go face-to-face, but you’ll go behind the screen…online is like that. It’s like being behind the [confessional] screen.” Mentee states, “It was good right away, I knew that…I could relate because of our [background]. And that helped a lot…I felt more connected with [my mentor]…throughout the two months…I really enjoyed my discussion with [my mentor]…[my mentor’s] responses…felt very comforting and…understanding…[J]ust hearing what [my mentor] had to say…just made me smile for some reason.” Mentor and mentee used social media and text messaging to coordinate and to learn about each other.</td>
</tr>
</tbody>
</table>
### Pair CLM Participation Mentoring Experience

<table>
<thead>
<tr>
<th>Pair 10</th>
<th>CLM Participation</th>
<th>Mentoring Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Re-match</td>
<td>Mentor stated, “I think the re-match was great…I thought we had a good rapport…[my mentee] was quite open…and then the discussions were going back and forth quite well.”</td>
<td></td>
</tr>
<tr>
<td>Mentor and mentee contributed to the discussion from October to November</td>
<td>The mentor states, “[W]e just jumped right in.”</td>
<td></td>
</tr>
<tr>
<td>Mentor and mentee participated in individual interviews at T3</td>
<td>Mentor used a similar approach to mentoring as in a face-to-face context. The approach was “wanting to help somebody understand themselves better—maybe just being a…sound board.”</td>
<td></td>
</tr>
<tr>
<td>Mentee stated that he was not able to participate as often because of other commitments, including service within the ministry</td>
<td>Mentee stated, “[My mentor] is pretty nice…it was nice having someone who responded right away and…kept me up to date…[my mentor] always text messaged me.”</td>
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<tr>
<td></td>
<td>Mentee stated that his mentor “went deep dive” into the mentoring right away. The mentee stated, “[I]t was cool…showing that [my mentor] was really open right away to being a mentor.”</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mentee stated, “I think [the mentoring] worked really well—and that’s something I didn’t think would be uh feasible…or at least to the level it got to.”</td>
<td></td>
</tr>
</tbody>
</table>

### 6.5. Selection of Cases to be Reported

Although I analyzed all dyads who participated in the interview process as single cases, I decided to report on three cases in depth, with one case from each of the three groupings. These three cases present different perspectives on the mentoring experiences and relationship development within the CLM. During the selection of these cases, I sought to avoid selecting those where the reporting of case details could lead to a potential breach in confidentiality, because the description of particular incidents might reveal the identity of the mentor or mentee. More importantly, I considered learning, more than diversity, when selecting which cases to report (Stake, 2006). The three cases I selected enable the reader to learn about the online exchanges between the mentor and mentee because each posted notes on Knowledge Forum.

For the discontinued relationship grouping, Pair 5 was selected because both the mentor and mentee exchanged Knowledge Forum notes, and it was the only pair within this particular grouping exchanging notes. I selected Pair 7 as an example of the challenging case because the mentor and mentee participated throughout the length of
the CLM. *Pair 8* was selected as the complementary relationship case because this pair was one of the original matches, as opposed to a re-match. Therefore, Pair 8 sustained communication over the longest period of time. Among all case pairs, this pair also exchanged the greatest number of notes over the course of the CLM.

The insights gained from these three case groupings allow for multiple perspectives on CLM mentoring experiences and relationship development to emerge. The three representative cases contribute to naturalistic generalization by providing rich and contextualized descriptions of a particular pair’s experiences (Stake, 1978). The upcoming chapter describes the cases, one from each group, in greater detail.
Chapter 7.

Individual Case Descriptions and Themes

7.1. Overview

This chapter presents three instrumental case studies highlighting the development of mentoring relationships within the CLM, as well as the challenges faced and benefits obtained by the mentor, mentee, or both. These cases were selected to reflect three kinds of mentor-mentee experiences that emerged within the CLM. The first case describes the experiences of Pair 5, whose relationship was categorized as discontinued. The second case describes the experiences of Pair 7, whose relationship was categorized as challenging. The third case describes the experiences of Pair 8, whose relationship was categorized as complementary.

The individual cases reflect perceptions about the interrelationships among the mentoring process, mentoring environment, and development of the mentoring relationship that were held by each member of a matched pair. Each case includes the pair's background and participation in the CLM. I also provide excerpts of their online communication. Then, the case themes are presented. Themes common to the cases in each particular grouping are discussed.
7.2. Discontinued Case: Pair 5

![Image of mentor and mentee notes]

**Figure 7.1.** Pair 5 mentor and mentee notes.
Mentor 5’s name is covered in black. Mentee 5’s name is covered in grey. Blue covers any identifying information.

7.2.1. **Pair 5: Who were they?**

Mentor 5 is in his mid-thirties and had been a ministry executive leader until he transitioned into another area of the organization, a few years ago. Mentee 5 has held leadership roles in other voluntary organizations, but not in the host organization. Mentee 5 is in his mid-twenties and joined the organization approximately a year before the CLM implementation. He had previously been asked to serve in a number of roles for the organization, such as being a small group facilitator in workshops. At the beginning of the study, Mentee 5 stated that he did not feel confident that his understanding of the faith was sufficient to accept leadership within a Catholic organization. He wanted to learn more about Catholic leadership to help him decide whether or not to accept leadership responsibilities.
CLM experience

Mentor 5 and Mentee 5 participated in the CLM orientation session and the first interview at T1. Mentee 5 also participated in the interview at T2. Between T1 and T2, Mentor 5 went on vacation. Faced with other priorities and concerns about the compatibility of his mentoring approach with the CLM environment, Mentor 5 discontinued participation in the program upon his return. Mentee 5 continued to seek opportunities to learn about leadership.

7.2.2. Pair 5: What did the pair write?

In this section, I present a narrative description of the discussion between Mentor 5 and Mentee 5. Examples of the pair’s Knowledge Forum notes are interspersed within the narrative.

Getting started

On May 28, 2012, after participating in the orientation session and attending to scheduling issues, Mentee 5 sends the following note:

Hey, sorry for being non responsive. This past week has been pretty crazy for me. I had and I caught a really bad cold. I wasn't able to go through any of the audio.

I am not really good with having stuff open ended. I like having stuff scheduled or at least have a due date. I was thinking beginning of the week have listen to some audio, middle of the week discussion, end of week further discussion/ decide what to listen to next.

This is just a thought.

I am going to listen to "2. the first to levels of success" tonight and hopefully have something posted about it the next day.

Figure 7.2. “Scheduling Stuff” note by Mentee 5 on Knowledge Forum.
In this note, Mentee 5 explains how a personal issue has kept him from listening to the audio material. However, he wants to start the CLM and sets forth a plan on how to approach the task.

At 1:45 am, on May 29, Mentor 5 replies to his mentee’s note. Mentor 5 states that he will pray for his mentee’s personal issue. He agrees with the proposed approach to the task and states that he will check for notes “every [M]onday and [F]riday.”

Later that day, Mentee 5 posts the following note in Knowledge Forum:

I marked a point in the timeline where it starts to pick up a bit.

I always found it interesting the role of leader in [ ], (and what Fr.Spitzer alludes to at the end) That the leader isn't really a person with "power" but a person who serves others. A person not with a lot of servants but a person that serves a lot of people.

I always knew leader assumed a lot of responsibility but not until i joined [ ], and took more roles, ever think of it as a servant to many. (servant doesn't really sound right but i think you know what i mean.)

Figure 7.3. First on-task note by Mentee 5.

On June 5, Mentee 5 contributes another note to the discussion and writes about his thoughts on the third audio segment, *The Higher Levels of Success*. 
“Getting to know”

On June 8, Mentor 5 posts a new note. He apologizes for not having logged into Knowledge Forum earlier. He has had a hectic week. Mentor 5 wishes Mentee 5 well with regard to the resolution of the personal issue the latter has been facing. Then, Mentor 5 states that he shall review the audio tags that his mentee has created in Audio Re-Searcher and shall respond to these before the next week begins. He also posts the following reply to Mentee 5’s note:

Hi [Mentee 5]
I wasn’t sure if your tag on the timeline was added. I wasn’t able to see any tags when I reviewed Audio 2. Anyways, its all good. I was able to listen to the whole Audio 2.

I guess as a mentor getting to know a mentee, I just want to ask two questions.

1. How you do you define success for yourself?
2. What make you happy?

Figure 7.4. Mentor 5 replies to Mentee 5’s first on-task note.
On June 17, Mentee 5 responds to his mentor’s note with the following:

1. How do you define success for yourself?
That’s a hard question for me to answer. Success is in one way, finishing something that you set out to do. I’ve been successful in finishing some things but have failed to see the success in others.

2. What makes you happy?
What makes me happy, is
seeing other people happy
listening to a song you forgot about
figuring out the answer to a question that was once, to me, impossible..
seeing someone smile because of something I did.

As a mentee to a mentor I ask you the same questions

1. How do you define success for yourself?
2. What makes you happy?

Figure 7.5. Mentee 5 replies to his mentor’s “getting to know [you]” questions

On July 25, Mentor 5 replies to Mentee 5’s latest note. Interwoven between Mentee 5’s questions are Mentor 5’s answers. Mentor 5 states,

Success for me is the fulfillment of God’s plan for me and through me. Sometimes we set goals for ourselves that fail even at our best efforts. To be able to see a greater purpose for the fulfillment or failure of a goal and still be at peace with it is SUCCESS for me.

Mentor 5 also writes, “Simple things make me happy.” He enjoys spending time with his family. He also states, “Things or events that I never thought I would have or happen make me happy.” He apologizes for the delay in his response to Mentee 5’s questions and explains how he has become busy with work. Then, Mentor 5 addresses how he intends to work through the CLM for the upcoming weeks. Mentor 5 writes, “I will continue to check in every Monday and Thursday. We can continue on from the last tag from the audio researcher. Hope you are having a great week.”
On August 14, Mentee 5, in turn, apologizes for the delay in responding to Mentor 5’s July 25 note and states, “I hope that we can get things rolling again and continue with the audio teachings.”

**The final note**

On August 19, Mentee 5 asks his mentor for help in understanding an audio segment about virtue and ethics. Then, Mentee 5 indicates that he will be attending a conference organized by the RNGO (see Figure 7.6). This note is the last posted by this pair on Knowledge Forum.

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**Figure 7.6.** Last note for Pair 5 posted by Mentee 5.

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7.2.3. **Case themes**

Five themes that emerged from my analysis of this case are

- differences in goals;
- perceived mismatch between the mentoring approach and environment;
- reevaluation of expectations;
- lack of communication; and
- time challenges.
Differences in goals

Mentor 5’s motivation for participating in the CLM derived from his indebtedness to the host organization for his spiritual growth. He, thus, wanted to help the organization by assisting in the grooming of its new leadership. Mentor 5 stated,

I think we’ve always been open to the idea of helping the younger guys, you know, the younger leaders; the new members... that was sort of [my co-leader and my] goal. To be able to still be involved even though—we’ve moved to a different ministry [of the RNGO]... our hearts are still with [this host ministry] cuz that’s where we’ve had most of our spiritual, personal growth come from.

An appropriate match between Mentor 5 and Mentee 5 appeared to have been made, based upon Mentor 5’s openness to mentoring new leaders and Mentee 5’s desire to learn more about Catholic leadership. Mentee 5 stated,

I know I was an up-and-coming person in [the host organization] and uh I know I’ve been asked to do bigger roles, but I have turned them down. And I just thought that maybe if I did [the CLM] maybe it could be some confidence... a boost so that I could like continue on building... maybe taking on higher roles; maybe preparing for that... I mean to me [the CLM] was pretty interesting, and it came at a time where I was really—I was really thinking about what I really wanted out of [the host organization]. And I was like, "Oh, maybe this is something I should push forward with.

However, a deeper exploration into their respective expectations revealed that Mentor 5 and Mentee 5 did not share similar goal orientations. Mentor 5 saw himself as grooming leaders for their roles and believed it important that he be able to assess the mentee’s leadership potential through observation. He said,

[Y]ou really see a person’s growth and dedication, you know, in practice—when you see them being present in certain activities. That’s when you get to see them, you know. Um, and know them really...I don’t really see him [in the CLM].

Mentor 5 wanted to observe and gauge the degree to which Mentee 5 was prepared for leadership. Mentor 5 aspired to the role of a coach, who would be able to guide a
mentee effectively based on knowledge of the latter's weaknesses and strengths as well as attitudes and behaviours. In his interview, Mentor 5 stated,

I mean, for myself to be able to help this person, I need to be able to know this person really well, more than possibly um the friends that he has. So that, for me to be able to know his own limitations; or know his own challenges; know where his strengths are and um it’s – that is something that is really important for me to be able to determine and figure out.

Mentor 5 described his relationship with Mentee 5 as “unfamiliar”. Further, Mentor 5 did not set goals for mentoring because he had limited knowledge about Mentee 5’s needs with regard to leadership, which hindered his ability, as mentor, to determine what these goals should be. As a result, Mentor 5’s stated goal for the next two months, until T2, was to develop his relationship with his mentee, such that he could set goals that would enable him to mentor effectively.

Mentee 5, during the same period, stated that the mentoring relationship was beginning to develop when Mentor 5 began asking him questions on Knowledge Forum. In his T1 interview, Mentee 5 said,

I don’t think me and [my mentor] have communicated enough to build a relationship. Or, it seemed like it was starting to form when he was asking questions that he did on the KF Forum; but when I sort of actually asked him a question back I never actually got a response, so it kind of just – I think it’s still on the building phase because we haven’t …—established a meaningful connection yet.

Despite agreeing with Mentor 5 that the relationship was not yet strong, Mentee 5’s expectations about mentoring did not require that he have a close mentoring relationship to benefit from the experience. Rather, Mentee 5 viewed the CLM as a means for gaining greater grounding in his faith, such that he could apply it to his life situations. He was less concerned about how to lead within a particular organizational situation than in gaining perspective on what it means to lead as a Catholic in everyday settings, which includes non-Catholic settings. Mentee 5 sought support in the development of this understanding, and he hoped to gain insight from the experiences of his mentor. His goal was to reach a level of confidence in his understanding at which he could better gauge his own preparation for leadership and, consequently, his willingness to accept
leadership roles. He had a collaborative orientation to learning, involving the sharing of perspectives and insights with his mentor. Mentee 5 stated in his T1 interview,

[I]t was cool posting something and then getting response...if you listen to like an audio log and then get someone’s opinion on it, it was pretty cool. And like I said before, I really enjoy listening to [those] audio logs because they give a different perspective on leadership that I haven’t had before, and it was just something that was really different.

**Perceived mismatch between mentoring approach and environment**

The key to mentoring, for Mentor 5, lies in the knowledge a mentor has about his mentee, which then enables the mentor to guide his mentee. In this case, the relationship must first be developed. However, Mentor 5 found that the asynchronous mentoring environment did not afford, for him, the quick and successive question-and-answer exchanges that he uses to learn about a mentee in face-to-face mentoring, because of time lags between questions and replies. Thus, Mentor 5 believes that mentoring at a distance works most effectively, in general and for himself, through synchronous modes of communication such as the telephone or live conferencing. He cited his experience of mentoring a leader in another city, via phone conversations, as being more conducive to his mentoring approach.

Mentor 5 believes that the spontaneity of real-time communication uniquely allows him to see the authentic character of his mentee. Thus, he viewed written communication as a barrier to gauging a mentee’s needs and progress. He stated,

I guess when you’re talking to a person on the phone or in person, you’re more spontaneous; there’s more you. There’s very little pretention. You get to express yourself as you think. I guess when you’re writing, depending on your writing style, for myself, I do so much thought in it that it’s rare for me to just jot something down and then later not go on to revise it. Most of the time, after writing, I would, you know, look at what I’ve just written and then, most of the time, I would just remove part or most of it; replace it. So, I think it’s more real when you’re having a conversation face-to-face or at least on the phone.
Mentor 5 also had concerns about the potential for misunderstanding when communicating by writing, which he stated in his interview.

**Reevaluation of expectations**

Mentor 5’s expectations required that he develop a close relationship with his mentee to guide him effectively. This expectation to develop that relationship, before determining the right course of action, to help his mentee was not easily facilitated by the design of the CLM. In addition, Mentor 5 explained that he had originally believed the mentoring environment to be online, but synchronous. When he found this not to be the case, Mentor 5 began to have reservations about the CLM because its focus on asynchronous, written communications did not feel authentic to him. In addition, he found the question-and-answer pace experienced within the environment “too slow”. He, therefore, began to believe that his mentoring approach was not appropriate for the CLM.

Prior to his interview, Mentor 5 had expressed concerns about the CLM’s orientation toward asynchronous, written communication and had intended to discontinue participation. However, he subsequently decided to attempt mentoring within the environment while trying to adjust his expectations. During his interview, Mentor 5 stated,

I’m not sure if you’d be able to get something out of me (laughs) in the way that we’re going, at the pace that we’re going. It seems that it’s really slow...Um, for me, it’s really out of my comfort zone. It’s not what I’m used to, right. So, I guess that’s the major reason why I was ready to throw in the towel...I have very high expectations when I’m mentoring somebody, not just for the person that I’m mentoring but most especially for myself, and I expect success in both the mentor and the mentee. So, I don’t really know—I’m very skeptical at this time [about] how much we’ll be able to accomplish, so I guess it’s just a matter of trying to be able to see what else we can do, you know, but knowing in the back of my mind that it’s not an ideal mentoring environment. *It’s not an ideal mentoring* means, for myself, to write instead of being able to communicate directly.

Despite Mentor 5’s concerns about relationship building, Mentee 5 believed that the relationship had begun to develop when Mentor 5 asked him questions in an effort for them to become more acquainted with each other. However, rather than being primarily
concerned about the relationship, Mentee 5’s expectation was to learn about being a Catholic leader using the knowledge shared with him by an experienced leader. Mentee 5 stated,

Well, getting first-hand knowledge from a former [host organization] head person, I think that would have been really helpful because knowing that [my mentor] went through a leadership position, and knowing that he had experiences...he would have good knowledge on how to deal with situations and from that knowledge, I could grow myself...Yeah, I think that’s the big point.

While Mentor 5 did pose questions that made Mentee 5 reflect upon the audio material, in accordance with Mentee 5’s own expectations for mentoring, Mentee 5 sought greater discussion about the audio material. Since Mentor 5’s expectations required that he develop a close mentoring relationship before providing appropriate guidance, Mentor 5 did not delve immediately into the task of discussing the audio material as much as try to establish a relationship with his mentee. Except for initial discussion about one audio segment, Mentee 5 did not receive responses to comments made or questions asked of his mentor on the audio material.

After a delay in communication, Mentee 5 accepted my suggestion that he consider contacting Mentor 5 to reestablish communication. However, he expressed the belief that “if it’s a mentor-mentee program, I think it would be the [responsibility of the] mentor.” This difference in expectations was not explicitly addressed by the mentor and mentee, but it reflects an issue that influenced the direction of the mentoring and the development of their relationship with each other. In essence, the relationship grew only to the extent that the participants’ respective expectations about communication were met. In addition, neither of their expectations was met to the degree they would have liked. Thus, both needed to reevaluate their expectations about mentoring and their respective roles as mentor or mentee throughout the course of their participation in the CLM.

**Lack of communication**

The mentoring environment required that the mentor and mentee coordinate their communication. Mentors and mentees were encouraged to develop a communication
plan for how they intended to proceed with the mentoring task. During the orientation session, Mentor 5 and Mentee 5 exchanged contact information so that each could text message the other. The pair could then notify each other when posts were made on Knowledge Forum as well as inform each other of changes in schedule, such as when one takes an extended vacation. In practice, communication could be inefficient. At T1, Mentee 5 stated,

Well, making sure to check on the forum and not knowing if something was new or not, so [to know] if I should check it [was a challenge]. I usually just check twice a week, like at the beginning of the week or at the end of the week if something happened.

Mentee 5 stated that automated notifications might provide for more efficient communication between mentor and mentee.

From May to July, Mentor 5 and Mentee 5 were contributing to the discussion regularly. However, communication between the pair stopped after the end of July. Neither exchanged text messages with the other to follow up on the CLM. Mentee 5 was unaware that Mentor 5 had gone on an extended vacation. During our T2 interview, I informed Mentee 5 of his mentor’s vacation. At this point, Mentee 5 gained some insight into a possible reason for why he had not yet received a reply from his mentor. Mentee 5 attempted to reestablish communication, in August, but he did not receive a reply.

**Time challenges**

Time represented another challenge confronting Mentor 5 and Mentee 5. In particular, Mentor 5 had commitments that took priority over the CLM, including his family, work, and other service commitments within the RNGO. Mentor 5 also found it challenging to access the audio material from a stationary computer. Mentor 5 stated, “I guess there’s this really huge challenge with scheduling. Not to make an excuse of our busy schedules, but it is very difficult for myself to sit in front of a computer on a regular basis.” Mentor 5 further stated that the environment did not afford him the access to material necessary to communicate with his mentee because he could not access it remotely. Mentor 5 said, “If the Knowledge Forum is accessible…through other mobile devices, I think that would have been…better.” Moreover, Mentor 5 found that the CLM
required that he spend more time preparing for mentoring than he had anticipated. He stated,

[I]t’s kind of hard because you’re reviewing it separately from your mentee. And when it’s time for you guys to—or for us to exchange ideas, that even one week of lag or even longer, you get to miss certain things like certain points from that material. So what I ended up doing is reviewing back to it... so that in itself is time-consuming... it’s just that to be able to review it with your mentee is a little bit difficult, especially if you’re not in synch... I guess it would work if we both set a schedule, a regular schedule to be able to go over certain material over a certain period of time. I think that would have worked. And maybe that’s something we need to work on as well.

Although periods existed when he was preoccupied with other obligations, Mentee 5’s schedule was relatively flexible. Therefore, he could spend more time on the CLM. During periods when his mentor was unavailable, Mentee 5 would listen to the audio material, which he found useful. However, he was only able to discuss the audio material with his mentor during the first two months of the CLM.

7.2.4. Case conclusion

At T2, Mentee 5 agreed to continue with the CLM, despite concerns about whether Mentor 5 would want to continue as his mentor. In fact, Mentor 5 was no longer available to mentor him. Given Mentor 5’s time challenges, along with the perceived mismatch between his mentoring approach and the affordances of the CLM, Mentor 5’s eventual decision to discontinue participation in the program did not come as a surprise. On his part, Mentee 5 had the requisite time and interest to participate in the CLM. Although the mentoring he experienced was abbreviated, Mentee 5 felt that the questions posed to him by his mentor promoted reflection, and he believed that the audio material was useful in providing insights into Catholic leadership.
7.3. Challenging Case: Pair 7

Mentor 7 has been a leader with the RNGO since his youth and has led in different chapters, aligned with the host organization. He is in his mid-thirties and continues to hold leadership. He is currently a leader in an Eastern Canadian chapter of the RNGO. Mentee 7 is in his mid-twenties but has participated in the organization’s activities since his youth. Those who know Mentee 7 make assumptions about his leadership potential based upon his involvement in the organization at a young age. Though he wants to lead, Mentee 7 does not believe that he is able to do so because of what he describes as “failures” in being able to apply his faith to life situations. He is interested to learn about leadership ethics and, prior to the CLM, had been wondering whether such a field existed.

CLM experience

While Mentor 7 described the mentoring experience as having been challenging, Mentee 7 viewed his mentoring experience as increasingly positive over time. This
mentor and mentee pair participated throughout the CLM, although a lapse in active participation occurred from July to the October jumpstart. Mentor 7 participated in all three interviews, and Mentee 7 participated in interview sessions at T1 and T3.

7.3.2. **Pair 7: What did the pair write?**

In this section, I present a narrative description of the discussion between Mentor 7 and Mentee 7. Examples of the pair’s Knowledge Forum and Audio Re-Searcher notes are interspersed within the narrative.

**Getting started**

Four days after this pair’s orientation session, which was on May 11, Mentor 7 posted a note to start the discussion (see Figure 7.8). As promised, Mentor 7 logged into Knowledge Forum and Audio Re-Searcher, tagging potential topics to discuss. Aligned with the suggestion to set expectations and discuss it in Knowledge Forum, Mentor 7 asked Mentee 7 about when and how to approach the task. He also asked Mentee 7 questions about the latter’s perceptions about and challenges with becoming a leader. On May 18, Mentee 7 posts a note apologizing for not communicating earlier and replies to Mentor 7’s questions (see Figure 7.9).
Hi [Name], I left you a message on Facebook to let you know this is where we need to start our discussions. If you got here then congratulations— you are in the correct place!

Hey [Name]! So in order to really get started, just a few things we need to get locked and loaded before we proceed with the meat of this program...

-How often will you be able check on here?
-What are you hoping to get out of this Catholic Leadership mentoring? What are your expectations?
-Do you have a vision for yourself as a Catholic leader? If so, please share with me what that looks like for you now.
-In your opinion, what are your hindrances to developing as a Catholic leader?
-What are some things that you think you think you can bring to the table when it comes to being a leader (in [Church], the Church, in work/school, in life in general)? In other words, what is unique about [You] that makes you different from other leaders?

**Figure 7.8.** Mentor 7 writes a note to “get started”.

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Hi [Name]! Apologies for checking up late. Anyway, I can pretty much check regularly from now on.

Basically, I'm hoping to get something more about being a leader. I'm hoping to know what does it really take to be called as a Catholic Leader. I don't really see myself as a Catholic leader someday BUT if it His will then I will accept it and be as one in accordance to His will.

In my opinion, there are several hindrances that a person could develop as a Leader. First, the stereotype. Second, the temptations that are out there. Third, people who don_t believe in God. It's very challenging to face those circumstances. For instance, you were to convince an atheist why you love your God and why believe on a higher power when they’re not visible by the eye.

I don’t really think that I can bring something into the table when it comes to being a leader. The only thing that I do best is to understand where a person is coming from.

**Figure 7.9.** Mentee 7 replies to “Getting Started” note.
Discussions begin

On May 24, Mentee 7 posts a note. He writes, “It's easy to be a leader in front of a Christian/Catholic.” He discusses the issues he is having with regard to Catholic leadership when in a secular work environment. Meanwhile, in Audio Re-Searcher, Mentor 7 responds to his mentee’s comment about Catholic leadership and work, and he suggests that they discuss this point further in Knowledge Forum (see Figure 7.10).

Figure 7.10. A note created by Mentee 7 and Mentor 7.
Mentee 7’s comment precedes his name, which is covered in grey. The comment following Mentee 7’s is signed by Mentor 7, whose name is covered in black.
On May 28, Mentor 7 responds to Mentee 7’s note by recognizing the challenge Mentee 7 is facing in his work situation and asks questions to clarify what exactly Mentee 7 is experiencing. He, then, provides suggestions from lessons he has learned from his own life, and he shares stories from his own personal experience within similar situations. He thanks Mentee 7 for disclosing this challenge to him. Mentor 7 writes, “I think we will have a very fruitful journey.” He also lets Mentee 7 know his plans for the upcoming week. Mentor 7 states,

Over the course of this week, I will choose a module in Audio Re-Searcher that we can further reflect on, but in the mean time we can continue to discuss these situations. :) ...If you haven’t already, listen to the first session on the Overview of Catholic Leadership. Then we will go from there.

Figure 7.11 is an example of what Mentor 7 wrote as notes to accompany tags made at particular points in the audio material. Mentor 7 posed questions directly on Audio Re-Searcher for his mentee to consider while listening to the audio.

Figure 7.11. Mentor 7 tags material using Audio Re-Searcher and poses questions for his mentee to consider.
On June 8, Mentee 7 posts another note addressing the new topic of leadership success within a Catholic context. Mentee 7 writes the following note:

There are times that I couldn't help but focus on the negative side of a co-worker. There are also times that I try to look at their good side first. How do you try and just be patient even though you know that it is being tested.

Levels 3 and 4 are pretty much straight forward. But while I was listening to it, the speaker was saying about 'willing yourself to be contributive.' It's like asking to force yourself into the world to contribute when the world rejects you.

These kinds of test makes me think and ask if I could really be a leader. When all else fails, I can't help but give up.

**Figure 7.12. Mentee 7 posts a note about notions of success.**

This is the last note exchanged, between Mentor 7 and Mentee 7, until October. At T2, the pair is asked to continue discussions for the remaining two months of the program, which is set for the period between October 11 and December 12.
Discussions resume

Communication between the pair resumes October 21 when Mentor 7 replies to Mentee 7’s note from June 8. Mentor 7 posts the following note:

Let me start with addressing the ‘willing yourself to be contributive.’ first... what the speaker was saying is that while level 3 is contributive. We find it really difficult to do without prayer or the grace of God. Therefore, we cannot simply just will ourself to be contributive. When we are seeking out level 4, then level 3 comes more naturally because level 3 is not a end in of itself, but a mode or step towards level 4. Does that make sense?

In your response to your question about how do you be patient, even though you are being tested: First let me say, it’s not always easy. Patience is not something that occurs at a singular point in time. It’s a virtue, which means its a choice you have to make repeatedly until it becomes second nature. So your patience will always be tested, sorry no getting away from that. But it is character building, it makes you stronger and makes your skin tougher. I don’t have any magic pill solutions, because I am challenged with the same thing as you. But what I will say is try this... everytime you find you are loosing patience with someone or catch yourself focussing on the negative, think about this... what is it that is making you think negatively of them?... if you are honest with yourself sometimes it comes from a place of competitiveness... we often are always comparing ourself with others (sometimes unknowingly)... the next thing is to put things back into perspective as the speaker mentioned. stop and reflect, write out if you have to and think about all the little good things they are trying to do, what their dreams are, any acts of kindness that you may have witnessed, how they are pursuing God or something good. Once you reflect on that, it’s puts things back into perspective.. this is real person. If after this, you seem to persist in focussing on the negative of someone, then perhaps a good, firm look at oneself to see what could be at the root of the attitude.

Try it and let me know if it works for you. Like many things in life, it becomes a discipline, so it’s something that you will likely have to continually work at.

Figure 7.13. Mentor 7 posts a reply to Mentee 7 after the jumpstart date
On October 18, Mentee 7 writes a note about a new topic, agape. He posts the following:

So, as christians, we are called to love one another and ask nothing from return. That's basically the GREATEST love of all. As christians, we practice that. But wouldn't it be greater than the greatest if we get something in return? Not that I expect that I will have something in return of my services or of my help but wouldn't it be wonderful if you have something in return? Like, let's say if you love someone, wouldn't it be great if they love you back? with the same amount of love or effort that you show them?

Figure 7.14. Mentee 7 posts a first note about agape.

On October 21, Mentor 7 replies with the following note:

Yes, it certainly would be amazing if we did get something back in return. Totally hear you on that! Something to consider though: If we are operating in agape, then we wouldn't long for anything in return. Otherwise we are motivated by obligation, not agape love. We would simply delight in the love that we give others. Keep in mind that in our modern world, when we refer to love, we can mean many things. However originally, there were many words for love, different kinds which didn't mean the same thing. I think nowadays, society has lost its understanding and sense of agape... can you think of any situations where you would sacrifice or give something, where it may not even be possible to get anything in return?

Figure 7.15. Mentor 7 posts a second note about agape.
Mentee 7 builds upon the discussion, on November 2, and contributes the following note to it:

I kinda get it now. Agape is based on the 2 greatest commandments. That's what you meant by operating on Agape. We give love not seek it. But we also have to love ourselves as well not just keep on giving it.

To answer, your question, yes! When I serve other people it feels good! So good that I was able to contribute something in their life.

I guess it's one of the cons of a modern day theist. We both know how it feels to do both. Conditional and unconditional.

Figure 7.16. Mentee 7 posts a third note about agape.
In this note, Mentee 7 also replies directly to Mentor 7’s question for the first time. Then, Mentor 7 builds upon Mentee 7’s note with the following:

![Agape.png](attachment:Agape.png)

Yes, it is awesome when we serve others. However we can't always rely on feelings because they fluctuate so rapidly. One thing I remember learning from [redacted] is that love is a decision more than a feeling. When we decide to give, we don't bother to calculate the cost, because in the end it doesn't matter what the cost is. Another interesting point that really resonates with me is that we are called to give, not share. When we share we are concerned with each other's portions and how much should I get to make it fair. However agape goes beyond this, where its primary essence is in giving alone, no if ands or buts. Agape is about giving, and nothing less. Easier said than done, I know.

I know it is possible, when you love someone, you do all sorts of things. Yes, of course I love myself, that doesn't mean I would let those I love walk all over me or do me harm... however I've found myself happier when I love without counting the cost. Happiness is a natural by product of authentic agape love as opposed to a means or motivator to to achieve it.

Ever have one of those experiences wherein all you can do is give or think about the well being or happiness of another?

Figure 7.17. Mentor 7 posts a fourth note about agape.

This note, posted on December 11, is the last one posted in Knowledge Forum. The CLM ends with a discussion on agape comprised of four notes.

### 7.3.3. Case themes

Five themes that emerged from my analysis of this case are

- differing mentoring expectations: journey versus inquiry;
- depth of discussion driver: relationship versus topic;
- communication issues;
- time challenges; and
- going “social”.

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Differing mentoring expectations: journey versus inquiry

Mentor 7 and Mentee 7 held different views about what they expected from the mentoring program. Mentor 7’s expectation was that he journey together with Mentee 7 as they explored topics and shared experiences. With this in mind, Mentor 7 stated,

[O]ne of the challenges for me is trying to let the mentee own their journey without obligating them to report back to me in any particular way…. I’m really here to journey and help you through your development, as opposed to “I’m in charge and I’m going to get you from point A to point B at the end of this course.” That’s not the way I’m approaching it…. [I want to] really let the mentee own it, and with the hope and the assumption that they would be consistent and there would be kind of a back and forth…volleying of opinions, and views, and sharing.

From Mentor 7’s perspective, this expectation about mentoring was never met. He observed that his mentee moved from one topic to another without engaging in deeper discussion or without replying to generative questions. Mentor 7 stated,

We’re exploring a topic but then the mentee will move onto the next topic…so any commentary I might have had; or questions; wanting to dig deeper was just kinda abandoned and moved on to the next topic. I mean we didn’t do a lot, but it felt for the few topics that we did cover…. I felt that the mentee basically picks from a menu: “This is what looks appetizing to me.” They chew on it a little bit, spit it out and say, “Well here’s my problem with it.” And that was pretty much the end of that particular topic. Move on to the next item and repeat the process again. So…I’ve tried to adapt to say “Okay, well, you know, if you’re engaged, we’ll work with that. As long as you’re engaged,” but like I said it’s been a challenge to be consistent, so it’s—it’s hard to adapt any further if they are not engaged… The challenge for me is: “Is it my approach that’s un-engaging, or are they genuinely just too busy, or is the topic just not what they had hoped for or expected?”

Mentor 7’s expectation of journeying with his mentee was eventually abandoned, and his focus became one of making certain that his mentee was engaged.

In contrast, Mentee 7’s goals related to learning about a specific topic, gaining insights from his mentor, and then applying this knowledge to his life. He did not believe it necessary to explore topics deeply but saw mentoring as a means for inquiring into
relevant topics with the assistance of a mentor to clarify understanding. When interviewed, at T1, about whether he had probed more deeply into his mentor’s perspectives or had shared ideas that differed from those of his mentor, Mentee 7 explained that he did not pursue topics further. Moreover, while Mentee 7 was tasked with selecting topics he found interesting for discussion, he found this task challenging because of his unfamiliarity with the topics. As a result, he could not know, prior to listening to the audio material, whether he would find the topic of interest. At T3, Mentee 7 explained,

So, um it was actually challenging, for my part, because I was actually looking for topics I could debate about and could actually really be curious about [regarding] insights [my mentor] could give me... So, yeah, it’s challenging for me because you don’t know...what might actually trigger you to talk about a topic or not...[or whether you can get a] good insight about this topic [from your mentor]—it’s just pretty much move forward [until you find a good topic].

This issue was more pronounced at the beginning of the CLM, prior to T1. During this period, Mentor 7 had also expressed concerns about the lack of depth in discussions he was having with Mentee 7. In his T1 interview, Mentee 7 stated that he did not ask Mentor 7 questions because he was unsure as to the extent his mentor could elaborate on what Fr. Spitzer had discussed in the audio material, because his mentor and the speaker of the audio segments were not the same person. Mentee 7 stated,

Instead of asking other people or instead of asking my mentor about it— because...maybe my mentor didn’t even know what the speaker was talking about... Maybe...it’ll be more effective if...I can ask the speaker.

During Mentee 7’s T1 interview, it was clarified that Mentor 7 had the background to elaborate on the audio material and that the material was to be used to generate further discussion.

By T3, however, Mentee 7 stated that he had gained insights on topics through his discussions with his mentor. Further, he believed that these insights could be applied to his life situations, thereby meeting his mentoring-as-inquiry expectations. Mentee 7 stated,
There’s stuff in the Audio Researcher that um...I might not actually... understand what Father is trying to say... and then...when I [asked my mentor], he actually guided me a lot more [about] what that means, and basically giving me quite an understanding on what that meant, and it is actually helpful because I [would have] never really understood if I didn’t ask him about that topic...It’s good to have someone [with] whom you can actually bounce off your ideas –like a buffer. So, basically when you have this concern – some deserving concerns about leadership, you have someone who can bounce off the ideas and basically maybe could relate to him or –well, surprisingly, he could relate, which is actually great. And who could actually...give you an idea on how to try it out and do it.

*Depth of discussion driver: relationship versus topic*

Mentor 7 sought to guide the discussion to a deeper exploration of the topics discussed in the talks. On the other hand, Mentee 7 did not view depth as being the main goal of the discussion. Rather, Mentee 7 sought to explore a topic when it was relevant to situations he faced and believed that his mentor could contribute to his understanding of being a leader within such contexts. As a result, Mentee 7 would often search for new topics until he found something of interest.

Mentor 7, however, was not aware of the criteria that Mentee 7 was using to drive discussions. Mentor 7 considered various reasons for why topics had not been explored more deeply, an issue that was exacerbated by the limited interaction the two had with each other because of time delays between discussion contributions. Mentor 7 attributed one cause for this lack of depth to be relationship quality. Indeed, Mentor 7 used his mentee’s lack of engagement in deep discussion to gauge how well their relationship was developing. At T1, Mentor 7 stated,

> [W]e’re really in the [stage of] establishing norms and kind of getting used to one another and establishing patterns, and we haven’t had as much back and forth…. I really feel that um I’m very much a stranger to him still. Um, I think our relationship online—the approach is more...it seems almost kind of like a reporting structure or like I am an instructor, although I did say that’s not really the intent... it seems very functional in terms of whatever interactions we have had, and nothing that’s really in the sharing realm or personal stories or personal reflection. It just seems to be very much on the surface, which is very typical, I guess, when you’re just starting a working relationship with someone. You’re just figuring out what the rules are and it’s just very surface. I’m not at the point, I guess, where I can
say I have a sense about the individual, or...I can anticipate where they may be going, or have a good hold on what may make them tick or what excites them. It’s just way before that even.

In fact, Mentor 7 decided to become more reserved in his mentoring approach, from his relational approach of journeying together to a “ball is in your court” approach, because he did not want to overstep his mentee’s personal boundaries. Mentor 7 believed that the mentor-mentee relationship was not at a level at which he could share openly with his mentee. Mentor 7 also perceived mentoring to be more challenging because he believed he could guide Mentee 7 more effectively if he knew about his mentee’s leadership challenges in a more personal context. In the absence of more information about his mentee’s situation, Mentor 7 used depth of discussion and clues from their discussions to attempt to understand Mentee 7’s situation and gauge his mentee’s receptivity to personal sharing. At T1, Mentor 7 explained,

[W]hat my challenge was—I would ask questions hoping to remain in one topic and dig a little bit deeper and ask questions, and that’s kind of how I try to gauge their engagement in terms of, you know, are they responding to just surface level questions or are they starting to share. Are they just talking theoretically? I ask lots of questions in the hopes of seeing how...they respond to those questions.

For his part, Mentee 7 viewed the relationship differently. He perceived his relationship with Mentor 7 as being open. At T1, Mentee 7 stated,

My mentor and I – we actually have a good relationship. There’s no things that I couldn’t actually tell him...I don’t think there’s any boundaries to what we say to each other...It’s like what I see is what I get.... we don’t hide anything, basically.

Furthermore, Mentee 7 believed that his mentor had lived through periods where he had not lived up to the ideals of the faith, thereby making it easier for Mentee 7 to be comfortable sharing about his own challenges in the mentoring relationship. During his T1 interview, Mentee 7 had already revealed the following:

It is kind of awkward [to open up to someone you do not know] at first, but then once you have, [your lack of acquaintance] wouldn’t actually matter...Plus, um it’s not like... the other person hasn’t gone through any dark moments [of having not lived up to his faith], which
probably [my mentor] did [experience], maybe. We haven’t touched base into that but maybe he did...[My mentor] seemed to have a dark past like everyone else. So, it’s not that uncomfortable [to open up].

Mentee 7 stated that he became more open with his mentor through his own initiative. He explained that this increased receptivity to being mentored began once he realized that the topics of the CLM were relevant and that he could obtain insights about these topics from his mentor. Moreover, he did not see the quality of the relationship but interest in the topic as driving the depth of the discussions. In essence, Mentee 7 was searching for insights that he could apply from the discussions to his life. At T1, Mentee 7 stated, “[W]henever I need something –whenever I have a question, whenever I am troubled, [my mentor] tries his best...he does whatever he can to support me whenever I need something.”

**Communication issues**

Mentor 7 found that his mentee was not responding as often as they had planned. Mentor 7 began to speculate about the reason for his mentee’s lack of a response, and he began to experience uncertainty about his mentoring approach. Since his mentee did not regularly reply to text messages, Mentor 7 became unsure about the degree to which his mentee was interested in being mentored. He was unable to discern whether his mentee was not responding to his messages because his mentee was lacking interest in participating in the CLM; he was using an inappropriate mentoring approach for Mentee 7; or his mentee had made a commitment to other activities. In addition, Mentor 7 was unsure about when it was his “turn to speak” and unsure about the degree to which it was appropriate for him to speak. He questioned his own expectations.

Upon reevaluation of his expectations, Mentor 7 accepted the role of occasionally messaging his mentee to show that he was still available as mentor and wait for his mentee to initiate further communication. Mentor 7’s reticence to take the lead in the discussions is understandable when his generative questions were often left unanswered. At T1, Mentor 7 stated,
I have obviously tried to adapt style, content to basically anything that gets [my mentee] engaged or excited or passionate about anything. But, I haven’t been able to tease that out or discern that based on our limited interactions, because it’s not that I have [him] in front of me, I am going purely based on written content. Um, like I said, my initial kind of, um, trying to throw the bait out there with...different questions [has] not been met, so I’m left wondering (laughs) to myself in this sense.

Because of the challenge of coordinating asynchronous discussions, Mentor 7 began to check Knowledge Forum less often, and he sometimes missed a message from his mentee. At times, the pair would need to be informed by the researcher-as-coordinator of the notes contributed on Knowledge Forum because the automated notification system had not been turned on.

Looking back over the course of the CLM, Mentor 7 explained how opportunity exists to provide guidance on how discussions in the CLM should proceed in order to lead to more constructive and in-depth exchanges. At T3, Mentor 7 stated,

There was definitely a lot of opportunity to [provide guidance] on maybe framing [how to structure the discussion] better. I thought it was clear, but maybe it wasn’t....there were times where...my responses...at the beginning [of the CLM], were pretty—a lot were lengthy, I think, and [contained] a lot more questions. And then his response was kind of more connected.... [to] the next topic. So, I don’t know if he even read um my previous message or not—or [whether] he was...planning on [just moving] to the next [topic]. I tried to leave some instruction, in my comments, saying, “Hey, can you not run off to the other ones, yet? Let’s just talk through this one. I mean if we don’t complete everything—if we don’t complete [all the audio files], at least we’ve kind of built upon this discussion.”...A lot of times, I’m going [into the mentoring task] basically trying to readapt. So instead of [going] down a particular path together, I’m trying to figure out what path are we going down together.

For his part, Mentee 7 also found the nature of the CLM challenging. Given that he was searching for practical insights to apply to situations he was facing, Mentee 7 found the lack of immediate and just-in-time support to be an issue because he could only contact his mentor virtually. At T3, Mentee 7 stated, “I think it’s pretty challenging because your mentor is not...someone around your neighbourhood [where] you take a bus and go door-to-door and talk to them.” Moreover, he found it awkward to discuss challenges
with someone whom he had not met in person. Despite his initial discomfort, Mentee 7 stated that his perceptions about the disadvantages of not having a local mentor was countered by the realization that benefits could be obtained by participating in the mentoring relationship. In his T3 interview, Mentee 7 stated,

Um, it’s actually challenging because um you haven’t actually met [your mentor] and you actually haven’t seen him or anything. And you’re actually um exchanging [stories about challenges faced] and thoughts; basically it’s not that easy. You can’t just simply open up to someone [who is] more probably close to you, so…it’s awkward first [with someone new and far away], but then…once you get to the part when you actually think that you might –you might get something from [the mentoring], that’s when [the discussion] starts to flow.

Throughout the CLM, however, Mentor 7 was unaware of the positive influences he was having upon his mentee. He remained uncertain about whether his notes were relevant to Mentee 7’s needs. During the interview process and, in particular, during the portfolio review, Mentee 7 affirmed that he had benefitted from the mentoring experience with Mentor 7. At T3, Mentee 7 stated,

[F]or the past six months, it gave me an insight on what the Christian leader should actually look for when it comes to taking the leadership properly...It’s not just about preaching God’s words and...discussing about Bible teaching.... it’s also about accepting lifestyle...[I]t doesn’t mean that you are a different person when you are at work and you’re a different person when you are in your Christian group. There has to be a fine line between...being bossy at work and being a leader at work...The most humble person...[can be] the most competitive; the most hard worker at work. For six months, [the mentoring] gave me an insight on how to do both [be humble and ambitious]... [The mentoring] reminded me to not forget that you’re still—you’re still human.

In essence, Mentee 7 began to have a better understanding of how to act as a Christian leader in his work environment, though secular.

The fact that Mentor 7 did not know whether he had contributed to Mentee 7’s development as a leader points to an inherent lack of communication. Mentor 7 had to infer, from the observations made from Knowledge Forum interactions, how he may have influenced Mentee 7. An example of how Mentor 7 made these inferences is
reflected in the following quotation from his T3 portfolio review. Mentor 7 was reviewing the Knowledge Forum notes when he stated the following:

Um, I don’t know, yeah, I don’t know if that’s a personal thing for me but it seemed to be that’s what I’ve come to see our interactions like up until this very last [note], which [my mentee] was basically—he only left a very—just a few lines. And, again, I really don’t know what’s going through his head. Um, we can only get small sound bites, in this particular platform, [of] this process, but I mean, he actually said, “I kind of get it now.” Which is interesting because we talk uh one, two, three – three topics [Mentor 7 counts the relevant notes in Knowledge Forum] and it seemed like a bit more – he had a bit more potentially [Mentor 7 is reading and referring to an earlier topic]—a bit more....“[w]ell, I’ve done this and I’m still like not winning” (chuckles). Right? That’s what it seems like, um. And then this last topic [Mentor 7 is looking at the last four notes on agape], um, that we kind of—we actually unpacked slightly a little more – we’ve got more than one interaction on it. Um, he’s like, “Yeah, I think I kind of get it a little bit.” And um yeah. And then, that was a bit interesting there, because if there was any kind of a change, according to me, that was the biggest change. Uh for some reason, well, either we found a topic that he could really relate to or he got, or we just got to the end, and he just wanted to say that. But um it just seemed like a bit of a different sentiment.

This disconnection between mentor and mentee experiences could be better addressed in the future design of the CLM.

**Time challenges**

Mentor 7 and Mentee 7 experienced time challenges within the context of this program. These challenges came from commitments to other obligations, scheduling difficulties, and communication delays. At the beginning of the CLM, Mentor 7 had expected that a reliable communication pattern would eventually be reached. Toward the beginning of the CLM, Mentor 7 would schedule a block of time from his week when he expected to participate in the CLM. However, after logging onto Knowledge Forum and not finding new contributions to the discussion, Mentor 7 realized that setting aside this time for the CLM would not be possible. At T3, Mentor 7 stated,

Probably the frustration of and also the opportunity is continually going in and not finding anything. So, in the initial stages, that was more of a disappointment for me and a demotivating factor--going in and not finding anything...So it was kind of a bit of a [change in strategy from]
“instead of wasting my time” [checking for a post] to [a strategy of]
“tell me when you’re in there; then, I’ll follow up afterwards”. So, as
far as a busy schedule is concerned, [what is important is] knowing
what the expectation of the time is for me, myself, because then I can
plan... In the beginning stages, I had blocked a certain amount and
said, “Here’s the time that I will commit”. Towards the end, it was sort
of “your turn; my turn; your turn; my turn” kind of a deal.

Time challenges for Mentee 7, however, related to unforeseen changes in his scheduled
commitments. He was unable to post as often or as regularly as he had expected
because of a new work schedule. At T1, Mentee 7 stated, “[W]e haven’t touched base
for quite a while because both of us have been quite busy. Um, yeah, cuz I—[since] a
month ago, I’ve been...basically, working [a lot], now.” The irregularity of discussion
contributions also led to increases in scheduling issues and time lags. At T3, Mentor 7
stated,

Um, once I was notified or found out that it was my turn to do
something, I guess you can say, then I had to quickly, somehow, take
a look at my schedule and find time to allot to [the CLM], which
sometimes takes more time to get to because if you’re telling me
today that “Oh, by the way, there’s a comment in there,” I might not
be able to get to it [until] two weeks now, because I am really, really
blocked up. Whereas, if I had known earlier, then I would have
guarded that time...whether it’s for both of us—or at least
myself...that’s one thing that I felt was a big opportunity, maybe not so
much in terms of support—but in terms of just the regular
commitment and the rigour behind consistently going and checking
anyways.

The time challenges, which the pair had experienced, led them to request for mobile
versions of the platforms used. Mentee 7 requested mobile access to the platforms,
while Mentor 7 requested greater integration with mobile technology. At T3, Mentee 7
stated,

Not that often, but I would actually like to [use a mobile platform]
because, for the last six months, I was actually more mobile than at
home. So, um, I was actually trying to access Audio Re-Searcher
mobile and...I couldn’t actually access it.

This lack of mobile access to the audio material affected the degree to which Mentee 7
could participate in the CLM because he did not have the time to listen to it at a desktop
computer. Mentor 7’s concerns related to the efficiency afforded by an integrated communication platform, which makes use of mobile technology and social media, to leaders with busy schedules. These concerns are explored in the following section.

**Going “social”**

Mentor 7 stated that one method for improving communication with his mentee was to use Facebook as the primary means by which to contact Mentee 7. When he contacted Mentee 7 on Facebook, Mentor 7 found that his mentee responded more quickly than through other methods of communication. Furthermore, Mentor 7 found that their discussion on Facebook “flowed”, meaning that communication was sustained. However, this sustained communication would be broken upon trying to shift the discussion back to Knowledge Forum. At that point, communication would once again halt. Mentor 7 wonders to what degree a forum that is not integrated with social media or accessible by smartphone is relevant within the context of current norms of social communication. These norms would be that communication must be efficient and that material easily accessed while “mobile”. During his T3 interview, Mentor 7 described the mentoring environment as follows:

[I]t’s kinda like…you have to go to the post office to go pick up your mail. Then, open it. Read it and then find time to respond and bring it back to the post office...And again, like I said, I think it really depends on the context of the people involved and I just...I’m really wondering in terms of—not saying it will never work—but, I think it’s about the time and place...maybe [the learning environment will work] for someone older perhaps—maybe someone younger; maybe with more limited means of communication, but for people who are on the go—I don’t –I don’t think this lends itself. Maybe it’s the topic as well. Um, this does require a certain commitment—it’s not just a “I can send you a quick message in five minutes”. I need to spend at least a half an hour on listening to something first, compose my thoughts, um before sending it off and then waiting. And then when someone else um sends their message back, reviewing that and trying to connect the dots again.

Mentor 7’s perspective on the use of Facebook in relation to the use of the CLM mentoring program suggests that ease of access was a principal contributor to scheduling and other time challenges experienced throughout the CLM. He observed that it was easier to discuss topics on Facebook because the participants of this...
particular program already use it as a means of communication. Moreover, Mentor 7 suggests that the mentoring platform is competing with other modes of communication for the attention of the mentee. As such, the platform must be “more in your face”, meaning visible to the mentee. Viewing a message on a medium that one already uses for communicating with others means that the mentee will likely view the message. Moreover, viewing the message, itself, becomes a reminder of the presence of the mentor and one’s participation in the CLM. By affording increased visibility, even e-mail works better as a mentoring platform than Knowledge Forum, according to Mentor 7. During his T3 interview, Mentor 7 stated,

Right, if [Knowledge Forum] were your only means of communication, I’m sure there’d be a bigger reliance on it, but um because there are all these different varieties and methods out there, this is actually probably a more inconvenient way to communicate with somebody in many ways. Like compared to say e-mail –because e-mails [of all your messages] would be in one place [that you normally access]. You might not be looking for my e-mail, but when someone else sends an e-mail, “Oh, yeah, by the way, I’ve got to see [my mentor].” It’s more in your face.

7.3.4. Case conclusion

Mentor 7 and Mentee 7 participated throughout the length of the CLM, but their respective experiences reflect scheduling challenges and differences in mentoring orientation and in communication expectations that influenced perceptions about the mentoring experience and relationship. These issues are likely to reoccur in future implementations of the CLM; therefore, these must be considered in the CLM’s design.

Over the course of the CLM, Mentor 7 and Mentee 7 were required to adapt to each other and the mentoring environment. Despite challenges, each was willing to continue with the CLM when asked. Mentor 7 made a positive contribution to Mentee 7’s understanding about being a Catholic leader, although he was unaware of his influence on his mentee. Specifically, Mentee 7 believed that he benefitted from the perspectives that his mentor provided to him, especially regarding how to remain true to one’s Catholic principles in non-Catholic settings.
7.4. Complementary Case: Pair 8

Mentor 8 has been a leader in the organization since his youth. He was also employed as one of the organization's mission workers and served internationally. Although a member of another ministry, he is not serving as a leader within the host organization because of familial, work, and academic obligations. Mentor 8 agreed to be a mentor for the CLM because of its online and distal nature. In addition, he enjoys and misses the mentoring aspect of leadership. He is in his mid-thirties.
Mentee 8 has been a member of the organization for approximately two years. He began his spiritual journey a few years before joining it, when he began seeking answers to questions he had about his faith. Mentee 8 is originally from one of the areas in which his mentor had worked. Although Mentee 8 does not like to call himself a leader, he is officially a new leader with the organization. Mentee 8 has not yet been assigned many members to lead, but he will be responsible for members who have already served in other areas of the RNGO. Mentee 8 is in his late-twenties.

**CLM experience**

Both Mentor 8 and Mentee 8 described the CLM mentoring experience as being positive and beneficial. They highly recommend that others participate in the CLM, with Mentee 8 suggesting that the current organizational leadership become participants. Both Mentor 8 and Mentee 8 participated throughout the CLM, but contributions to the online discussion ceased during the last third of the CLM, after Mentee 8 accepted various opportunities to lead. This came about because Mentee 8 took his mentor’s advice to “just say yes” to opportunities that came his way. Mentee 8 sought to model himself after his mentor.

**7.4.2. Pair 8: What did the pair write?**

In this section, I present a narrative description of the discussion between Mentor 8 and Mentee 8. Examples of the pair’s Knowledge Forum notes are interspersed within the narrative.
Getting started

Mentor 8 posted two notes, on May 23, six days after the orientation session.

Mentor 8 writes the following note:

Hi ...sorry for the delay. It has been a crazy weekend/week. I meant to complete this reflection on Sunday but I was not finished my project and I just finished everything yesterday. First of all, before we begin, I just wanted to share with you my approach for this mentorship program. Its the same approach I have always taken as a member and leader of the community. Whenever God asks me to do something, I always say yes. Regardless of my lack of skill/knowledge/talent/faith. And in doing so, I found that He always has something to show me. I approach this program with an open mind, heart and soul. As we listen to the lectures I want for both of us to ask God first, what he wants us to learn and to give us the strength and courage through the Holy Spirit to act on His direction. Let’s see what He wants for us now. God knows what stirs your passions within your soul. Allow Him to show you more by being open. I am excited to see His plan for us!

Figure 7.19. Mentor 8 sets forth a vision for the mentoring experience.
Mentor 8 set forth his approach to the CLM and then posts a note commenting on his impressions of the first audio segment, An Overview of Catholic Leadership. Mentor 8 shares reflections about his life, past and present, which the material has prompted. He writes about lessons learned and about actions he believes he must take to continue on the path of Catholic leadership, even in a non-Catholic setting. Mentor 8 writes the following note:

I found it very easy to relate to this lecture. As you know, I used to be a Mission worker for... Then I decided to change jobs... That was probably the most difficult transition I have ever been through. From a life where I felt God all around me to an environment where being a catholic principals are viewed as outdated and wrong. The only way I have managed to survive such a negative environment was my faith and prayer time. It has kept me grounded when faced moral dilemmas and strengthened my when facing challenges. The big surprise was when people started coming to me for advise on relationships, family life, religion and questions about the Catholic faith. In this experience, I learned that I didn't have to stand on my chair at work and recite biblical scriptures to my colleagues. All I had to do is be who God made me to be. By applying the Beatitudes to my everyday interaction at work, I guess people started to gravitate to me. When asked why I was happy or peaceful while going through a challenge, I attribute that to my faith in HIS Divine Providence in my life. I really enjoyed listening to this talk. Lately it has been a challenge to be joyful at work and this talk reminded me how to get back to the peace... I need to strengthen my prayer life again. It is interesting when some of my most unhappy times correspond to my lack of prayer life. When it comes down to it...it always starts with your prayer life. How you interpret the world and interact in it is a reflection of your relationship with God.

Figure 7.20. Mentor 8 posts a reflection on the first audio segment.

On May 26, Mentee 8, in turn, replies with a note about his impression and reflection on the audio segment (see Figure 7.21). He empathizes with his mentor's challenges and states that he, too, would like to have a stronger faith life.
Very interesting audio about Leader. What is a Christian Leader? As Christian, I am called to be closer to God and imitate Jesus’s life. It was a life with ethic and virtue. The talk reminds me of the importance of building a prayer life to reach that goal. I asked myself many times should the Christians appropriate the terms ethic and values? I don’t know the answer but I understand we should live with ethic and values. I grow up with a good sense of ethic and value (I think) but I find hard to put God in the center of it. I look forward to listening the audio about the theology of success and failure because it’s what defines my relationship with God.

I understand the challenges you faced when you move into the “real world”. Thanks God, you survive haha. I’m hoping to be closer to God by listening the audios and to have a consistent prayer life. It’s good to be a leader with a sense of beatitudes.

Figure 7.21. Mentee 8 posts a reflection on the first audio segment.

Mentor 8 builds on the discussion, on May 29, with the following note:

Hi [Other person],

I too was raised with good ethics/values. I was taught the Golden rule by my parents..."Do unto others as you want them to do unto you." It sounds good and makes perfect sense, until you meet someone who doesn't want to treat with respect. It is in those instances where my ethics/values were thrown out the door and I became defensive/aggressive. It wasn't until I placed Jesus in the center of all my decisions where I was able to deal with negative people by being patient, understanding and forgiving. It is easy to be nice to people who are nice. Jesus gives you the strength to be nice to the people who don't like you..."love thy enemy". I asked Jesus to consume my heart and the Holy Spirit to strengthen me in my challenges/obstacles and that is when I feel Him most...when I am at my weakest. At first it was difficult to place God in the center but once I did, He affirmed me in my decision. Life has been good with Him. Obviously challenges still occur but because of Him, I don't think its the "end of the world" but I see it for what it is...God is molding me, guiding me and protecting me. Put Him first in all things that you do...say YES to Him when you are called to serve and you will see!! He has a Great Adventure planned for your life!! Sometimes the hardest step is the first..but once you take the first step...everything else falls into place.

Figure 7.22. Mentor 8 posts a build-on note.
**Holding steady discussions**

On May 31, Mentee 8 posts a note on a new audio segment, *The Levels of Success* (see Figure 7.23). Once again, he shares about his impressions and reflections. He reveals challenges he is facing in his faith life and with expectations he has for himself. He recognizes aspects of his faith that he must commit to practice.

![Image of lecture notes]

*The talk is too deep: Listening to this Father is the same as listening to philosophy :)*

We usually say “all successful people are not happy” and “all happy people are not successful”. The analogy between “success” and “happiness” explains why the 1st statement is true and 2nd statement false. People in general, including me, have the wrong notion of happiness and success. I didn’t listen to Father’s talk about happiness but I want to conclude that being happy makes you a successful person.

I was expecting to hear that we have a combination of the 4 levels of success in different degree. I found myself in the level-2 category even I don’t consider myself as a successful person. I used to have jealousy, suspicion and hatred in school and sometimes in sport. Maybe I will develop those emotions again when facing unfair competitions.

I put lot of pressure on me to reach that success and I should pay more time to understand its real meaning. I wonder if I didn’t focus more on how to not fail than how to succeed. And maybe that’s why the biggest emotion I have developed is “Fear”: fear to be judged and to lose admiration, respect, control, and confidence…shy and modest who doesn’t want to take high responsibilities even in the community. And after a self-examination, I realize that it’s only about “Ego”.

I remember a passage in the bible where Jesus said: “Be not afraid” and I know the importance of putting Him in the center of my life (what I promise to do since). I just need to realize that He is “molding me, guiding me and protecting me”. I want to YES every time but I question my capability. Someone will say “God won’t give you what you are not able to achieve”

Discussion:

**Figure 7.23.** Mentee 8 posts a reflection on the second audio segment.
In reply, Mentor 8 posts a note, entitled Proverbs 3:5-6, on June 3. Mentor 8 shares a biblical verse that helped him through similar doubts and challenges that his mentee is currently experiencing. Mentor 8 also writes about that period of time in his spiritual journey and encourages Mentee 8 to journey in the faith. Mentor 8 writes the following:

"Trust in the Lord your God. Rely not on your own understanding In all ways acknowledge Him and He will make your paths straight."

This has been one of the most powerful verses for me. When I was younger I had goals for myself. I wanted what my parents wanted for me, to become:____________________. When reality hit it was very discouraging. It came to a point where I lost complete confidence and had no direction. There was a sense of feeling lost and unsure. It wasn't until I joined the community and discovered my faith and ultimately His plan for me. I learned that He loves me no matter what. That his heart is big and His memory of my sins are short (once I went to confession). He knows deep in my heart what makes me happy. More so than myself. Before I thought the ability to buy anything I wanted would make me happy and therefore making lots of money would help achieve that goal. What I didn't know was that He made my heart to be compassionate for others. It took a leap of faith to discover that. I had to let go what I thought I wanted, what my family wanted for me and what the world told me I wanted. I had to LET GO AND LET GOD. Logically speaking, God loves me and has a plan for me, therefore if I let Him lead me, it will work out Great because it is His plan. He made me therefore He knows me. I began to say Yes to everything He asked. Not knowing where it would lead or how I am going to accomplish it. It was never about capability, it was always about AVAILABILITY. Availability to His Holy Spirit to lead me. It sounds crazy but I have to say it worked. I am a shy person by nature. I like to keep to myself. However, when I told God I would say Yes. He started asking to me to lead worships, do sharings, lead:___________, do talks, lead:___________, etc. I was always nervous up to the point I went on stage. I always said a prayer and asked God's Holy Spirit to takeover. And sure enough He did. I thought to myself, if God asked me, He must think I can do it...regardless of what I thought of myself. It goes back to, He made, He knows me. Since then, He has taken me on adventure of service and experience. Travelling was the perk...but what I got most out of it was meeting all the people and being inspired by their stories. He knew that happiness for me was living a life with purpose. A purpose for others. Retreats, one-on-ones, discussions groups, talks, conferences,____________________ made me extremely HAPPY! It was hard, challenging, heart-ache at times, joyful, inspiring and AWESOME! Just to see God work in others. Some people say that miracles don't happen...I got to see it everyday I said Yes to HIM. I discovered happiness and success is discovering and living God's plan for you. He knows what makes you happy. The challenge is to say YES. It would be different if we had a God who likes to play with lives such as the ancient Greek Gods or Roman Gods...but our God (the only God) loves us like a father. I encourage you to take a leap of faith and discover His GREAT ADVENTURE for you!!!

Figure 7.24. Mentor 8 posts an invitation to journey in the faith.

Notes of a similar tone, but consisting of different topics continue until Mentee 8's June 21 note.
After a pause: Continuing as before

A break in communication was observed between June 21 and August 26. After this pause, Mentee 8 posted the following note about how he has seen his faith at work in his life:

I couldn’t imagine how great the Holy Spirit is working in us. I realized now the many times He was in me even I couldn’t feel Him.
In my previous note, I was telling that I preferred to take communion after confession. I’m known as rebel: I don’t like rules; but I am trying to follow the law or be in conformity with the teachings in the Church. And I think the Holy Spirit is doing something in my behaviour.

[Text continues]

Figure 7.25. A note by Mentee 8 reestablishes communication with his mentor.
On August 28, Mentor 8 replied to Mentee 8’s July 21 note and August 26 note. The communication continued as it had previously and with similar intensity. For instance, Mentor 8’s response to the August 26 note is as follows:

Figure 7.26. Mentor 8 replies to Mentee 8’s note to resume discussions as before.

After reflecting on my past mistakes and challenges, I realized that living a Christian life in this ‘modern’ world is extremely difficult. I listened to the speakers and sharers and what they are saying makes perfect sense, however understanding it and living it out are entirely different. In order to live a Christian life...I would need help! I learned that the Holy Spirit will help me. However...I had to realize a couple of truths before I can truly experience the Holy Spirit. First is HUMILITY. I need to accept the fact that I can’t do it alone. Pride will always be a hindrance to you experiencing the Holy Spirit. The second is FAITH. I needed to truly believe that God has a plan for me and to TRUST that plan! If you have faith...you will naturally go to God for everything but also have PEACE in your heart through good and difficult times. And the final thing I had to do was confess. Sin is like dirt in your ears and over your eyes. It will be difficult to hear and see HIM if you are deaf and blinded by sin. I notice a real difference when I am in sin...I don’t have that peace in my heart and I suffer more from anxiety and fear. When these 3 aspects are covered...its amazing to see where God takes you and how the Holy Spirit helps you...especially in the difficult times. You don't even need to ask...HE already knows what's going on and HE takes care of it...in the way HE sees fit! Its amazing to witness. The gifts of the Holy Spirit will enable you live out the life HE wants you to live. HE will give you courage in the face of overwhelming odds (pro life debate with coworkers). HE will compassion when a smelly homeless person begs for money. HE will give you patience when dealing with a difficult person (sometimes a person is difficult because of negative past experiences that you are unaware of). Its just amazing! First start with HUMILITY (accept you can’t do it without HIM). Have FAITH in HIS plan for you. And clear your ears and eyes so you can hear and see HIM...go to confession and sin no more! Its a never ending process...but always know that you are never alone! and more importantly...HE LOVES YOU!!
The last discussion

On September 8, Mentee 8 posted a note about contemplative prayer. He stated, “I listened to the audio first last week and I decided to include a contemplative prayer in my daily life for few days.” He explained his difficulty establishing a consistent prayer time. Mentee 8 asked Mentor 8 to shed light on how to approach contemplative prayer as well as to provide insight on the relationship between God and love. Mentor 8 replied on September 25 with two notes: one about love and the other about prayer.

Mentor 8’s post about contemplative prayer is as follows:

I find that when I contemplate or reflect on how God has changed my life, I can’t help but be sooo thankful to Him for saving me. Life for me was very different before the community.

Saving me means He LOVES me. Saving me means He has something better for me in life. Looking back on the great adventures I have had so far and all the amazing things I have to look forward to. I can also see how He has helped me with all the challenges I have faced and gives me confidence in knowing He will be there for me for the many more challenges that will come. It all started when I asked Him to take over my life. I acknowledge that He knows best and my choices haven’t been the greatest. He has shown me sooo much more that I even expected.

Contemplation on His love for me also helps me see situations in His eyes, which gives me peace and understanding. How has God shown His LOVE to you? Start with a prayer and ask the Holy Spirit to open your heart to HIM and then start reflecting on those perfect moments and the challenging moments. And discover where He takes you!

Figure 7.27. Last note for Pair 8 posted by Mentor 8.

This note was the last one posted in Knowledge Forum. The discussion ends as it began, with an invitation “to discover where [God] takes you”.
7.4.3. Case themes

Six themes that emerged from my analysis of this case are

• discerning the leading of the Spirit;
• sharing experiences;
• mentor as model of a life lived in faith;
• becoming a leader;
• time challenges; and
• mentoring process as shared reflection.

Discerning the “leading of the Spirit”

As mentor, Mentor 8 sought to be open to opportunities that could provide for meaningful reflection and exchanges between Mentee 8 and himself. Mentor 8 wanted to share, with his mentee, how his faith life began and how it evolved into leadership. This being the case, Mentor 8 stated the following in his T1 interview:

Well, the goals that I had for this, whether it be for me or for him—I think for both of us—was truly to find out what God wants for us, for him and for us. And with that, let’s just see it—let’s just see where He takes us.

This quote reflects the Catholicism of this organization and, ultimately, the belief that a higher power guides members of the faith in their actions and discussions, provides opportunities to learn by experience, and communicates through prayerful reflection. This experience of revelation is something that Mentor 8 wanted Mentee 8 to experience. He wants his mentee to be able to recognize the attitudes and markers that Catholics believe they can use to discern what this higher power desires for them to understand. In relation to this, Mentor 8 expanded upon the above statement with the following:

[O]penness allows us to not be closed to anything else that He says...cuz if we were set on a specific direction, there is a temptation to not listen to that topic of a talk if it does not coincide with the direction you want to take it. So, what I do is I just keep it as open as possible and hear what God has to say and a lot of times it’s the
unexpected, right, like “Oh, wow, I didn’t think about that,” or “the timing was perfect based on the situation”. And that’s what I wanted both [my mentee] and I to experience.

Mentor 8 views the mentoring process as one in evolution, wherein his role is that of an experienced participant on a mentoring journey led by a higher power. He saw the audio material as providing a springboard for exploring topics relevant to Catholic leadership, but he believes that the situations to which these topics apply cannot be determined until the mentoring process has begun. Mentor 8 continued,

The topics for this speaker [Fr. Spitzer] is too much like the basics of your faith life and how to live that out...it’s not easy to put a very specific goal on it, because you don’t want to miss on the other stuff just because you’ve been set on a specific goal...and because [you are set on] this particular teaching.... So, with that, I wanted both of us to just listen and be quiet...and let’s hear what God has to say. So, that’s pretty much the goal, which in practice with community work has always been the same goal... [T]o hear [what God wants for us], we just have to shut our mouth for a bit and forget—our plans are not His plans, so to speak. So, we’ll just figure out what His plans are for us. So, that’s the approach I took.

Mentor 8 believes that learning is achieved from “listening to the Holy Spirit” for guidance on what the pair is meant to explore through participation in the CLM. In the same T1 interview, Mentor 8 stated, “You know, I kind of put my faith in Him to lead us in that direction...cuz I think that’s... where we truly learn, especially when it comes to faith teaching.” The mentoring pair’s discernment process for this direction determines how the mentoring discussions take shape. His goal for the CLM, therefore, was to discern this direction with his mentee.

At the start of the CLM, Mentee 8 had not set for himself clear goals for the mentoring experience. At T1, he stated, “At first, I didn’t fix a goal - at the beginning – I didn’t know, like, what the goal of the mentoring [was].” However, as the mentoring progressed, Mentee 8 began to set goals for himself that arose from his discussions with Mentor 8. These goals related to how to put one’s faith into practice. Specifically, he sought to understand his faith more deeply through its application, especially regular prayer. Mentee 8 stated,
Uh, for sure, I have new goals because the more I know about [my mentor], the more I wanna apply my faith or do the same. In my action, I mean. Like, sometime[s], his suggesting some ways to practice my faith; his faith—how he’s doing it. Sometime[s], I wanna try to do the same: [to be] more in contact or in touch with God—talking [praying] every time with Him.

The progressive development of clear and practical goals, over the course of the CLM, aligns with Mentor 8’s view of mentoring as a process that evolves over time. Moreover, Mentee 8’s goals are based upon the Catholic practices of prayer and discernment that Mentor 8 wanted for his mentee to experience. At T3, Mentor 8 stated that what he stressed to Mentee 8, throughout the CLM, was to “[s]ee where God takes you.”

**Sharing experiences**

As mentioned, Mentee 8 began to develop goals for himself as he began to know more about his mentor, after whom he began to model himself. Mentee 8 stated that the more he came to know about Mentor 8, the more he wanted to be like him. Mentee 8 believed that the orientation session was helpful in setting the tone for the mentoring relationship. At T1, Mentee 8 stated, “With video[conferencing], [the orientation] meeting we had the first time yeah…That helped a lot, yeah… And I saw him [my mentor] like smiling, laughing. He saw me laughing; joking, yeah. So, it helped a lot.”

During the orientation session, observations revealed Mentor 8’s sharing of personal leadership experiences with Mentee 8. Mentor 8 related to Mentee 8 his experiences on international missions to areas near Mentee 8’s home country. Mentor 8 used this approach to build trust, which he believes is critical to developing mentoring relationships. At T1, Mentor 8 stated,

I opened up first. I created, I made myself –I don’t want to say vulnerable, right, but I trusted him first and with that I think that helps build bridges. You know, if I’m just going to be asking questions to him and what he thinks and what I think he should think…without sharing about my own personal life, my own personal thoughts, um, he’s just going to answer me …as a student to a teacher, like without the trust… One way to get people to open up is you do it first. You know what I mean, and that’s always worked. In the same way, with Mentee 8, I’ve taken that same approach. You know I wear my heart on my sleeve, right? So, I can’t help myself but talk that way to him…and share my deepest thoughts on those religious matters. And
so, with that, he does the same thing. And the fact that I’ve done it with my own personal experience, whether it be embarrassing, whether it be not a great experience—or even a great experience in itself—and that I learned from it, you know—no matter what it was, it’s always been personal with him, right...I think that’s helped build the bridge [between us].

Mentor 8’s sharing of personal experiences early into the mentoring relationship aligned with Mentee 8’s expectations for the mentoring process. At T1, Mentee 8 stated, “I wanted to know...my leader’s—my mentor's faith. Yeah, [he is] gonna [bear] witness [to] his faith and tell me more about God or his relationship with other people.”

When asked how the CLM environment influenced the use of sharing experiences as a mentoring approach, Mentor 8 stated that the asynchronous nature did not afford the use of nonverbal cues, for which Mentor 8 compensated by writing responses using a personal tone. Mentor 8 observed that Mentee 8 also used a personal tone when writing to him. In essence, Mentor 8 did not believe the online, asynchronous environment required him to change his mentoring approach, which he uses across settings, including face-to-face meetings. At T3, Mentor 8 stated,

I don’t see a difference [between the CLM and face-to-face environments]... No, because I mean thankfully, he writes —he writes in a personal level...I could tell if someone’s writing generically to me or not, and he’s not. So, I look at our note taking and messaging, I guess, as conversation. So yeah, I don’t see the difference. But, also it feels natural with him, so that’s why I feel like I’m listening. Um, I mean for all I know I’m reading it all wrong. Right? But, from what I can gather from his questions, no. They’re very personal and sincere. And I can sense that.

Mentor 8 gauges the relationship’s progress using the degree to which Mentee 8 shares about his own experiences. As Mentee 8 began to share about his personal experiences more candidly, Mentor 8 used this as a sign that the mentoring relationship was progressing well. At T3, Mentor 8 stated:

[My mentee] became more open—by like week two (chuckle)...The second or third session, he was —he was more open about his weaknesses than he was before. You know what I mean? And I guess that just comes with more comfort and trust.
Because Mentor 8’s expectation that there be an increase in the sharing of personal experience was being met, he did not believe it necessary to change his mentoring approach. At T3, Mentor 8 stated, “I’m comfortable with him…I never felt…I needed to change a strategy…It was – he was always very responsive.”

At T1, Mentee 8 stated that he enjoyed not only the audio material, “teachings”, but also “[My mentor]’s experience…His sharings and advice.” This enjoyment was shared by Mentor 8, who stated that mentoring Mentee 8 had been a positive experience for him and that, if not for time challenges, he would have liked to do more. At T1, Mentor 8 stated,

> And I tell [my spouse] after I’m done writing out what I want to say and after I get my response from Mentee 8, “It’s-it’s – it feels nice.” You know what I mean? Like, it feels good. Like it’s been such a long time since I’ve talked like that. Shared stuff about my faith…that way—[on] that level…. I mean, if I haven’t said it yet, the emphasis really is the timing of those talks. You know, I learn a lot from it, and sharing that with someone else, with Mentee 8, has also been very fulfilling, if I can use that word. It’s very fulfilling for me to share with someone else those types of reflections. It’s not often I get that chance, so for me that’s what I enjoy the most about this uh mentoring program.

Mentor 8’s approach to mentoring also provided Mentee 8 with an example of the lived experience of someone practicing his faith. Through Mentor 8’s experiences, Mentee 8 began to learn more about the faith of a Catholic leader. In so doing, Mentee 8 continued his spiritual journey of finding answers to questions he had about his faith, which was also the impetus for his having joined the organization. Mentee 8 came to understand, from Mentor 8’s experiences, that becoming a Catholic leader was a process. At T1, Mentee 8 stated,

> Okay, his example is his life. He gets that faith from his service. So every time when we talk, and he gives me one example of how he sees things, that helps me, like, to see it in that way. But not always because…I have my questions. I say, “Oh, he did it…he didn’t get it like [at] once…. yeah, he didn’t get it suddenly. This was a process…yeah. That’s why I like to read it [Mentor 8’s notes]. That’s encouraging me…to be patient also.
While neither mentor nor mentee would call their relationship one in which they knew each other well, they shared a mutual respect and trust for the other, built upon what they had shared and how they related to each other. At T3, Mentee 8 stated, “I mean I’m lucky to have uh Mentor 8 as mentor…it could have, like, been different. Mentor 8 was available – one. He was sharing. And he was not judging me also…. So he was talking, like, to a brother, kind of.” Meanwhile, at T3, Mentor 8 stated,

He seems to understand what I’m saying…When I read his responses or even just his question[s], I really sense that he’s searching. I mean, he’s hungry for something. He’s hungry to learn; he’s hungry to figure something out. Like, he’s sincere…. When he’s sincere like that—or, at least, [that’s] how I feel, based on what I’m reading—it tells me that he’s engaged in the conversation. He’s engaged in the topic. He’s actually thinking about it within his own life, as well. And so it’s not just answering simple questions, but also…applying it him[self]…just reflecting or internalizing the topic, so to speak, to himself, and then finding things where, “You know, this is where I would like it going.”…He’s not about [just asking] questions either. He’s not shy about his challenges or weaknesses, and that’s something that’s very good too. And the fact that he can talk to me about it shows me there’s a trust. And I appreciate that trust. I respect that trust. So, I’m only—I ain’t lying to him. I ain’t making up stories for this guy. You know what I mean? And [I’m] just telling him the truth based on my experiences.

For Mentor 8, trust develops through the sharing of experience, especially when it issues forth from a sincere search for understanding. This pair’s mentoring relationship was characterized by mutual respect and trust, built through this sharing of experience and openness to the other.

**Mentor as model of a life lived in faith**

At T1, Mentee 8 stated that after becoming more familiar with Mentor 8’s experiences, he sought to explore his own faith in ways similar to what Mentor 8 experienced or suggested. While the audio material was important in providing information on the principles of Catholic leadership, as espoused by Spitzer, Mentor 8 was a person who could serve as a model of lived faith and from whom Mentee 8 could gain insights on how someone might become a Catholic leader. At T1, Mentee 8 stated, “Because, you know, how I see him as a mentor is through his example of how [he
became a leader]; by sharing his life; what happened to him. From there I can develop my faith or know what is happening [when I face similar situations].

Mentor 8’s perspective on his role as mentor, which is that of relating his experiences and insights to his mentee, is compatible with Mentee 8’s expectations. Mentor 8 believes that his personal experiences will be relevant because he perceives the path to leadership as having been similar for the majority of people he has encountered. At T1, Mentor 8 stated,

[W]hen I did mission work...when I had one-on-ones with people, or when I did talks or when I did training activities or anything like that, it was never...about book smarts...I wasn’t coming from a theological point of view. I was coming from a real life point of view and stuff that I’ve experienced personally in regards to my faith...I truly believe uh those are all lessons from God to me in my personal life...[W]e, all of us, live similar lives—we have different variations, but somewhat similar in a way. And with that, my sharings of my life can go across the board. Likewise, [my mentee’s] sharings, whether it be there in [Western Canada] or out in [another continent], will go across the board as well. And what I like to do and...something I pray about—I ask God to speak to me through other people as well, right. So, I will hear....God speaking through [my mentee] to me....And it’s exactly the same approach I take with him as well.... I don't like to speak of just academic stuff.

Mentor 8’s approach to the discussion is one focused on the sharing of lived experience, as opposed to that of developing deeper theological understanding. At T1, Mentor 8 stated,

It’s stuff [theology] I don’t really know.... I can quote a book all day long if you really want me to, right, but that’s not how I deal with it. I was never good at that...That’s all face value for me. You know what I mean? I speak from my chest—you know that. So, I learn from the speaker [Fr. Spitzer] and I internalize that. And then, from there, I share that [internalization] with Mentee 8. So, that’s essentially what it is...And when he does the same thing, and he provides his input, I learn from that as well.

This approach was aligned with Mentee 8’s expectations, since he wanted to understand what it was like to be a Catholic leader. Additionally, this process provides an opportunity for Mentor 8 to learn from his mentee’s experiences as well.
Further, Mentee 8 wanted to understand how one could be a leader while still seeking answers to questions about the faith. One thing Mentor 8 wanted to impart to Mentee 8 was that it is often difficult to understand the faith until it is practiced. Mentor 8 believes that it is while practicing the faith and in leading that answers to questions about religion and leadership are revealed. At T3, Mentor 8 stated,

Official Catholic teaching, when you hear it from someone else, a professor or priest—it really does—in some senses, sound a little bit complicated or difficult or meant for just holy people. But one thing I learned in the community [RNGO], as a layperson, was really to simply say yes. And seeing where God takes you, and God will lead you somewhere as long as you just say yes, right. To really understand the fullness of His love and mercy and also to experience what He really has in store for you, it really starts with you just saying yes.... I don’t need him to memorize the five gospels; and the epistles; and how it correlates and to the time of the Old Testament...that will all come, but the first act is to say yes. And then everything really just falls into place.

Mentor 8 noticed Mentee 8’s desire to explore his faith. It is by living the faith that Mentor 8 believed his mentee would find answers. Ultimately, it is this lived faith that Mentor 8 wanted for his mentee to experience, because it was through the practice of the faith that Mentor 8 had arrived at his own understanding. At T3, Mentor 8 stated,

[Practices like] being able to hear the Holy Spirit speak to you. It really starts with you saying yes. And I always shared that with [my mentee]. And that’s the only way I learned. Like, someone told me the same thing, “Say yes,” and I did. And then I started to discover things. You know, see things—what God has in store for me. I-I can’t –I never told [my mentee] what God had spoken to him...I have no idea [about that], but if you really want to discover that, just say yes....whether our conversations have whatever impact in [my mentee’s] service, it’s not because of me...ultimately, it’s God that drives....I said to Mentee 8, “You know, praying [you should do that]—praying; experiencing the Holy Spirit.

During the CLM, Mentee 8 read how Mentor 8 had gone through his own faith struggles, yet still became a Catholic leader. In his T2 interview, Mentee 8 stated, “With [my mentor], he already experienced life from his faith...when I read him or when I see what he’s doing, I just say, “It’s possible.... Now, it’s my turn to be like him”.

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For Mentee 8, the mentoring that he received from Mentor 8 provided him with greater impetus to accept service opportunities; Mentor 8’s being his model of faith influenced his decision. When asked to create a portfolio of notes that he found significant, Mentee 8 selected one in which Mentor 8 had written, “I believe with all my heart that the first step to strengthening your faith and starting what God wants for you is to say, ‘Yes.’” Mentee 8 pointed specifically to this note during his portfolio review. At T3, Mentee 8 stated,

I discovered, yeah, [my mentor] found that faith. And I like to read his story—about what he’s doing; and how he handles people, his faith, and difficulties.... I was trying to answer some question. I started to...question my faith; try to understand “What is faith? Who’s God?” And, with Mentor 8...Mentor 8 and the teaching, it’s kind of — one solution or example of someone living his faith, or an example how to live that faith or how to put it in action....[B]efore, I was [concentrating] more on my research; trying to understand or question [the faith]. Now, yeah, I still have question[s] but...to see it’s easy for someone [my mentor], I think, like, there is [a] possibility [that I can strengthen my faith].

From this quotation, one can infer that Mentor 8’s lived experience provided Mentee 8 with a window into how faith can be put into practice and an example of how someone became a Catholic leader.

**Becoming a leader**

Although officially holding leadership, Mentee 8 had difficulty viewing himself as a leader. At T1, when asked about leadership, Mentee 8 stated, “I’m scared of that word.” When I probed as to why leadership scared him, Mentee 8 explained,

Me, seeing myself as a leader, yeah, it’s going to take time. I know like the rules or I know how they [Catholic leaders] approach it [leadership]—all that. But after that [accepting leadership]...Maybe [I have a] fear of responsibilities or, when they are talking about the values, the fear of –I don’t know [the exact reason why I am scared].

Mentee 8’s note to Mentor 8, on May 31, provides insight into this fear (see Figure 7.23). Mentee 8 writes, “The biggest emotion I have developed is “Fear”: fear to be judged and to lose admiration, respect, control, and confidence....I want to [say] YES every time but I question my capability.”
At T3, Mentee 8 explains that his lack of preparation for the role contributed to his concerns about leading. He stated,

I was called to be a leader. I wasn’t prepared for that. I wasn’t even expecting to be—to play that role: leadership...[To lead], I want to be the same level [spiritually as] my fellows...like those guys I’m supposed to lead, my members (laughs). And I don’t want to run after them....I know—it’s my role...but that’s why I say—I’m not that leader who is patient; who is trying to understand; who is trying to love their members [which is what is expected of a Catholic leader].

Mentee 8 views becoming a leader as a process, but he believes that he does not yet have the attitudes required to call himself a leader. At T3, Mentee 8 stated,

I don’t want to use that word “leadership” thing...Because the word “leadership”, how they define it here [in the audio segment]—first, [Fr. Spitzer] is going to say, “Find time [to pray] first. You will find time when you have that leadership—when you take leadership; and you will have those virtues; those praying time or when you are taking those leadership [roles]” and I haven’t yet [achieved these practices and virtues]. It’s like a process. You know?

Despite Mentee 8’s hesitance in calling himself a leader, his leadership responsibilities had increased by T2. He attributed part of this increase to his acceptance of his mentor’s advice to “say yes” to opportunities to serve. At T3, Mentee 8 stated,

In September, it was—we were asked to lead or to organize the overflow Mass at [the parish], and they choose me like one organizer, and I say okay. Because I remember always “say yes” from Mentor 8....[My mentor’s] telling me...to do more service. Yeah, that’s why I say yes, and [my service] it keep[s] me busy.

Mentee 8 prefers to describe himself as a “servant”. However, servanthood is essential to being a Catholic leader, as exemplified by Jesus, the leader who washed his disciples’ feet and asked them to follow his lead and, metaphorically, wash other people’s feet by serving them (John 13:1-17; New American Bible). In Luke 22:26, Jesus stated, “Rather, let the greatest among you be as the youngest, and the leader as the servant.” One of the host organization’s leadership workshops is devoted to the topic of developing the attitude of a servant and refers to these quotations. When asked about this conception of
a leader as servant, Mentee 8 recognized the concept but still rejected the idea of his being a leader. In the same interview, Mentee 8 stated,

I rely on my strength. As Catholic leader, you’re not supposed to. You put everything into God’s hand. And as a leader, also, you develop that contemplative prayer; you develop that virtue...like Catholic or Christian principles: you develop that love of your neighbour; of your – of those people [you are] serving...[Leader as servant] is Catholic.... I know. Maybe when I say, “servant,” maybe it’s just like I don’t want to be the one –the main character kind of... Or maybe I’m afraid to –to step up and take –big like big responsibilities, kind of.

Mentee 8 admits the possibility that leadership responsibilities make him hesitant to refer to himself as one; yet, Mentee 8 has accepted leadership responsibilities. Moreover, he also states that the mentoring he has received has helped him to reconceptualize notions of leadership within a Catholic context. The element of service in leadership enables him to accept leadership opportunities when he considers them as acts of service to others. At T3, he stated:

[For] someone like me... the mentoring [is] going to help... build a new understanding of leadership, not like being a president or being something high, high, high level, but it’s more uh—in this small level where you are accomplishing something, but small—just serving; helping someone. You’re helping someone.

**Time challenges**

Pair 8 experienced time challenges to their participation in the CLM. Mentor 8 found his participation constrained by family, work, and other obligations. However, he enjoyed the mentoring process to the extent that he wished that he could have contributed more. At T1, Mentor 8 stated,

There’s just not time in the day for everything. You know, like, I come [home] and I have all this stuff for the kids and with my [spouse] and whatever and then [other responsibilities]—I have to be honest with you, I think I bit off more than I can chew...So that has truly been my only challenge with this; [it] is just time. And that’s something, again, I’m very apologetic for because I feel bad, because I know it’s so beneficial when I do do it...for him and for myself. You know there’s only positives in this experience, I find. But, it’s just finding that time; making that time, you know.
These time challenges contributed to time lags within the discussion of topics.

However, Mentor 8 and Mentee 8 had already developed a rapport and comfort level with each other, such that Mentee 8 did not hesitate to contact his mentor to continue their discussions, after a month of no communication. Mentor 8 had gone on vacation and had become preoccupied with work upon his return. Despite the need to spend more time reviewing previous audio segments, before writing a new post, Mentee 8 still wanted to discuss new topics with Mentor 8. Therefore, Mentee 8 took the initiative to post first in Knowledge Forum. In his T2 interview, Mentee 8 stated:

I think it was almost one month [since we last communicated]....I said, “Now, I know the talk[s]...are all related,” so I needed to read—to listen [to them] again [to write a new post].... it’s like [I wanted to discuss] the next topic because I wanted...to listen [to] the whole [library of] talks...from Fr. [Spitzer]... so I wanted to listen more. And [discussing those talks] with Mentor 8...might be helpful, of course.

When asked what kind of advice he would give to other mentees, Mentee 8 further stated, “Don’t put a lot of pressure [on] to your mentor... yeah, you have to tell him it’s like a discussion. Kind of...two-way discussion.”

What helped with handling time challenges, according to Mentor 8 and Mentee 8, was that they remained faithful in communicating to each other their availability and in notifying each other when they had contributed to the Knowledge Forum discussion. At T3, Mentor 8 stated,

I wanted to do this every week, but we haven’t been able to do that. He’s also been quite busy, apparently...but tell you what helps, the texting to let me know if he wrote [a note]. And I’ll—and vice versa. So that helps, cuz when I know he’s done something...then I’ll make it a point to check it...So that helps with the time because... instead of just going on and nothing’s going on...then, we’re not wasting each other’s time, as well.

However, Mentee 8 was faced with a different kind of time challenge and elaborated on the amount of time he needed to write a post. At T1, Mentee 8 stated,

No, it takes time for me.... It’s hours. I take hours for sure...It depends because, if I have time, I start—I start listening one day—just listen.
and get some ideas....And maybe the second time...write down the main ideas...and like try to catch...[or] understand and use key words. Yeah. And when I get it [the meaning]...I start writing. And when I write yeah (smiles) yeah (chuckles).... Yeah, usually [it takes] one evening—usually two, three hours, yeah, something like that.

However, Mentee 8 eventually learned how to align his approach to the task with the affordances of the environment, as the following exchange, during the T2 interview, shows:

Researcher: Does it still take you three hours—an entire evening to write a note?
Mentee 8: No, no, no... sometime[s], I start[ed] writing the note like two, three sentences or four sentences. And I stopped because I have to do something else. And then I come back refresh[ed]...

Mentee 8 adds, “Sometimes, it’s like going [and I am working on the task] and I stop it because I’m tired to think or I just...pause; do [the task] the next day or another day. And listen it again.... [The task] It’s not hard.” Over the course of the CLM, Mentee 8’s process became more aligned with expectations of how participants were meant to work within the environment, which was designed to afford participants with a means by which they could develop ideas at their own pace, rather than in real time.

After having accepted opportunities to serve, Mentee 8 found himself busier. His increased responsibility made it difficult to continue practices viewed as essential to the spiritual life of a Catholic leader, such as having a contemplative prayer life (Spitzer, 2004). This consistent prayer life, including participation in the contemplative practice of Eucharistic adoration, had been one of the CLM goals that he had wanted to achieve. At T2, Mentee 8 stated,

You have the [Eucharistic adoration] where you find peace...Yeah, sometime[s], I have that...that desire to go [to] the adoration chapel. Cuz...I-I used to do that. But the thing is —if I do that, but —I’m too busy now (chuckle).... Now, I’m going [back to where I had been at the start of the CLM]—I’m starting at the beginning [in terms of being inconsistent in prayer]. It’s like when you approach Him [in Eucharistic adoration], you cannot say [as an excuse that] you’re busy.
Mentee 8 recognized that he had now entered “that busy stage” of leadership, during which leaders are encouraged to prioritize their prayer lives, regardless of their schedules (Spitzer, 2004). A Catholic leader relies on prayer time for reflection, meditation, and spiritual nourishment (Spitzer, 2004). Without prayer, which is conceived as being how the leader communicates with God and finds direction, a Catholic leader would believe it difficult to lead effectively. At T2, Mentee 8 explained,

Father [Spitzer]... he was [saying] this one [practice of contemplative prayer] is [essential] for... leadership... [of the] Christian kind...[But] now, I'm falling to that busy stage [of leadership].... But sometime[s] I'm tired. And when I get there [to the chapel], I might fall asleep. (laughs)...but every week, I wanna go...But I have to work on it [and make this prayer life consistent], yeah....There is a peaceful—like okay, here, here, (Mentee 8 is opening a Knowledge Forum note on a laptop). Yeah, this one (points to Mentor 8’s note) is when [Mentor 8] is talking about uh love and the [Eucharist]. So, [Mentor 8]’s saying everything started by the Eucharistic [which is central to the Catholic faith] and —Yeah, I’m telling you this... I wanna go [to Eucharistic adoration]... to the adoration chapel. But, I’m having hard time [finding time] to communicate with God [through prayer during adoration].

Mentee 8, through his acquaintance with the audio material, recognized that he was now facing the challenge of balancing prayer life and leadership.

Mentee 8 sought advice about the difficulty he was facing with contemplative prayer from Mentor 8. Just prior to the T2 interview, Mentor 8 had replied to Mentee 8’s note. Their discussion is evidenced in the following exchange from Mentee 8’s T2 interview:

Mentee 8: I started already doing the contemplative prayer.
Mentee 8: But the thing was I was not doing it properly... Fr. Robert [Spitzer]’s way.
Researcher: Oh. Okay.
Mentee 8: So, I get like a little bit lost...when [Fr. Spitzer] was explaining it.
Researcher: Oh. Okay.
Mentee 8: Now, that’s why I ask in a note to Mentor 8 [questions about contemplative prayer]. So, he [is] gonna tell me
something about that [contemplative prayer]... I haven’t read it [the note] yet.

Mentee 8’s increased service meant that he was often away from a stationary computer and he felt increased pressure to make more efficient use of his time through multi-tasking. This change prompted his asking whether he could listen to the audio material on his mobile device; he wanted to listen to it while driving. However, Mentee 8 also believed that doing so would detract from his reflection on the material. Consequently, he proposed that he would only listen to the audio material on his mobile phone to become acquainted with the topic. Mentee 8 strove to balance efficiency and effectiveness for the tasks required of him by the CLM. After T2, however, Mentee 8 had become preoccupied with service obligations to the extent that he was unable to write another note, despite having listened to material during the last third of the CLM.

**Mentoring process as shared reflection**

Both Mentor 8 and Mentee 8 do not enjoy writing for its own sake. At T1, Mentor 8 stated,

I can write, but I don’t write journals or blogs or anything like that. I don’t like the writing just for the sake of writing because it’s fun. But, I know I can write. I can communicate my thoughts clearly on paper. My [spouse] is pretty impressed with that. No, I don’t have a problem with the typing.

During his T1 interview, Mentee 8 was asked about his experience with the mentoring task of listening to audio material and writing notes. He answered, “Yes, it’s helpful for me [and] for my [writing] but, at the same time, I find it challenging.” He further states that the writing process reminded him of school, as evidenced in the following:

[It is] like when I was at school—homework...Yeah, homework. School. Sorry. (laughing)...no, it’s—something like that [the mentoring task], when it benefit[s] me, I have to do it because [it is] about the faith [which is important] and about like [improving] my writing skills.... So, I have to do it [the mentoring task].

Thus, Mentee 8 is willing to participate in the mentoring task, despite finding it challenging to write notes, because of its being valuable to the learning of the faith.
Mentee 8 believed that writing asynchronous notes afforded him the time to revise, clarify, and think of new comments or questions, before contributing a note to the discussion. This is evidenced in the following exchange from Mentee 8's T2 interview:

Mentee 8: For me—[the benefit to writing and posting notes] it’s ...how to formulate a question or how to write the sentence or how to, um, how to express the idea differently...or maybe another question coming from what [was written in the note before]—because you still showing it [the note] to—showing me it [because the note still appears in Knowledge Forum]... So, you still –maybe you will have more question[s] or you will see “Oh, maybe I will rewrite this one in another way”, kind of.

Researcher: Right. Right. I understand. So, you’re able to revisit the same idea; you’re always thinking about it.

Mentee 8: Yeah.

Researcher: Okay, and you can go back and add more questions or refine your questions or—

Mentee 8: yeah.

Researcher: —answers [to] whatever you’re writing. Okay.

As for Mentor 8, he too drew benefit from mentoring within the CLM environment. In particular, he benefitted from reflection. At T3, Mentor 8 stated, “Well, how can I describe it? When I reflect on it, I draw a lot of my past experiences into those answers and in those experiences... just remembering those experiences is inspiration all to its own.” Not only did Mentor 8 share his insights and experiences with Mentee 8, but he was also reminded of experiences important to his own development as a leader. Moreover, this reflection prompted Mentor 8 to envision how his faith continues to apply to his life. Essentially, Mentor 8 saw the mentoring experience as an extension of his spiritual journey. Mentoring was not simply about sharing experiences, but it became a means by which Mentor 8 reflected upon his own faith life. At T3, when probed in what way he found the mentoring “great and inspiring”, Mentor 8 stated,

Well, it got me to think about the topics; um, learning about the different parts of our faith. You know, about leadership and listening to the Holy Spirit. And I guess, in a way, it reminded me of the times when I used to serve a lot more. And that’s what really brought the big inspiration part. It also taught me a lot of things too—that I can use in my current situations, like, you know, with family and everything, so that’s what I find inspiring. So, I guess expressing it [through writing notes was great and inspiring]. It’s one thing to
listen. It’s another thing to actually talk or type about it. By expressing it—it means even more. Like, I get to formulate it in my head; you know? And I get inspired by that in itself. You know what I mean? As I talk or I type, my thoughts go to Mentee 8.

Mentor 8 found the sharing of personal reflections to be meaningful. This shared reflection was something that mentoring provided an avenue for doing. Mentor 8 elaborated,

We had a few conversations, back and forth, Mentee 8 and I. Again just focusing on the topics at hand....And uh the opportunity for me to deeper reflect on the topics, you know, and share what my experiences are or what my thoughts are on the topic with Mentee 8....It reminded me of [God’s] tools like....the tools that I use; the tools that [God] taught me back then but also right now....So that’s one of the things, when writing it out [that was afforded]... And writing at [Mentee 8’s] level, in a way... it forces me to reflect on myself. It was never just about me communicating to him; it was God communicating to the both of us. And whether it be from him to me or from myself to myself, that’s the kind of stuff I experience when I do this mentorship with Mentee 8.

In addition, Mentor 8 affirmed the reciprocal learning that the CLM can provide. At T3, Mentor 8 stated,

It’s like in the discussion, he’ll provide an insight or a point of view, and he doesn’t know it, but when I read it, I pick up on the little details and the little details are what strikes me—When it strikes an emotional chord or an intellectual chord, based on the topic, that’s what I mean by, in a sense, I learn from his responses, as well.

This shared reflection also met the expectations that Mentee 8 had regarding mentoring. As previously mentioned, in his T1 interview, Mentee 8 had stated, “But at the same time, I wanted to know...my leader’s—my mentor’s faith. Yeah, [he is] gonna [bear] witness [to] his faith and tell me more about God or his relationship with other people.” This learning about the faith through his mentor’s experience is precisely what was facilitated through shared reflection. At T2, Mentee 8 explained how shared reflection contributed to his understanding of leadership. Mentee 8 stated,

I don’t want to say Mentor 8 and I have like that affinity, but...there is one subject and we want to put time in that one subject...and think
about it, meditate or reflect on it...because in [other host organization activities], you can have also some topics like that, but it's just like for one hour...or two hours. But this one, I listen [to] it once, the talk. I listen [to] it many times and take my time to see what to write or what to –what path—make a reflection.... [I reflect on it] Not like just one minute or ten minutes. It's just like something I try [to]...to chew on it, yeah....that's why I want to take time to listen—to understand what they talk about or what [Fr. Spitzer is] talking [about in the audio material], yeah.

This process of reflection and sharing was something that was meaningful for both mentor and mentee. At T3, Mentor 8 stated, “[I]t’s been very good. Very inspirational for me that is....And he responds to it really well.” During the same T3 interview, when asked what exchanges he found most significant, Mentor 8 stated,

Really, I can tell you all my notes are significant....I felt that I guess – for me, I’m very consistent with my – like I’ve been very upfront with him. For every conversation and every question, I’ve never held anything back so...everything meant something....there wasn’t a time it was dry in a sense—where it wasn’t as meaningful as the next or the prior, but everything’s been very meaningful for every topic; for every question he’s asked.

In turn, when asked whether his experience with his mentor had helped him with understanding leadership, Mentee 8 stated the following in his T3 interview:

Yes, I will say yes. Mentor 8 and the teachings –like the teaching is something—hmm—I want to say new but not really new new. It’s like telling you process – how to do thing[s], but after you have to apply it in your life. And Mentor 8 kind of telling me some experience he had [helps with this application]... Once, I think I told you that last time, it [the CLM] is not the same teaching [as the one you would receive from the host organization’s leadership workshops]. This one [the CLM]–this one is not only about the [host organization], this one is in your life—to develop that relationship with God....the teaching here [in the CLM] is more about your virtues, I see, and how to get those and how to develop those. But in [the host organization], it’s going to be more—I don’t know how they—there are those things, but it is not developed. This one is deeper. This one [the CLM] is...deeper... [on] like those topics.

Shared reflection added to Mentor 8’s and Mentee 8’s understandings about leadership. In addition to deepening conceptions about leadership, shared reflection afforded opportunities for growth in how they saw themselves as leaders, at this point, in their
respective lives. Moreover, Mentee 8 believed that the shared reflection, which was afforded by the CLM’s design, added value to the leadership training he had received from the host organization.

Because of his experience in the CLM, Mentee 8 recommended the program to everyone “[e]ven those [Executive Ministry] Heads”. This recommendation could be supported by Mentor 8’s own experience as mentor, when he stated that the CLM afforded spiritual reflection on his own leadership. At T1, Mentor 8 stated,

I like it, you know. I like communicating with [my mentee]. I like listening to the talks. It’s interesting cuz the talks I find on a personal level kind of like hit me...where I need it at the time – like the timing is always perfect, even for myself when I listen to those talks. I mean I could be thinking about something for a week, cuz it’s kind of like bothering me or just I’ll stress out about [it]. And then, I’ll hear those talks and I’m like (nodding) “Ah, ah, yeah.”...It’s an answered prayer for me as well... So, you know, yeah, I guess I’m the mentor...but I’m also getting mentored, right. And sharing [my insights from prayerful reflection with God] with Mentee 8—[sharing] my insights is mentoring him. You know what I mean? So, it’s kind of a great experience for not just him as the mentee so to speak... in some cases it’s designed for him, but even for the mentor, myself, you know—this is new stuff; this is rekindling old stuff....And it’s—it’s very positive.

7.4.4. Case conclusion

Ultimately, Mentee 8 had found in Mentor 8 a model of someone living out his faith. Both mentor and mentee said their experiences in the CLM promoted reflection. As Mentee 8’s service obligations increased, he was unable to post but he kept in mind what he had learned from Mentor 8. Toward the end of the CLM, during his T3 interview, Mentor 8 inquired about Mentee 8 because he had not heard from him for some time. I explained that Mentee 8 had taken on more responsibility as a leader. To this, Mentor 8 said, “No wonder we don’t—no wonder we don’t talk that much anymore.... Well, praise God.”
7.5. Conclusion for Individual Cases

For each of the three cases presented, participants’ conceptions and expectations about mentoring, technology, relationship building, and their respective roles were revealed as they worked through the CLM. Although this chapter aimed to highlight the particularities of a case, note that the themes selected in the reporting of each one were typical of its grouping. Patterns that began to emerge during the analysis of each of the seven cases, including the three presented in this chapter, informed the cross-case analysis that will be the focus of the upcoming chapter.
Chapter 8.

Cross-Case Findings

8.1. Overview

This chapter presents findings from the cross-case analysis, informed by each of the seven individual case analyses. Each case revealed different perspectives and situations on mentoring issues, such as approach; experience; and expectations. During the cross-case analysis, cases were juxtaposed against one another and new themes emerged, enabling me to make assertions about how participants’ perceptions influenced how they conceived and interpreted leadership mentoring, their participation, and the development of their relationships. The themes presented in this chapter are described from the emic perspective of the participants.

Themes that emerged from the cross-case analysis of all seven cases are

- variation in mentors’ approach;
- the role of relationship in mentoring;
- attributing responsiveness to interest;
- obstacles to participation; and
- CLM communication affordances.

These themes will be discussed in turn.

8.2. Variation in Mentors’ Approach

Prior to the CLM, I met with each mentor individually and sent documentation (see Appendix A) to orient each on how mentoring will be used to forward CLM goals.
Despite the orientation training provided on mentoring, my findings revealed that mentors held different assumptions and expectations about the nature of mentoring that, in turn, influenced the approaches they used with their mentees. Over the course of the CLM, mentors did not display a consistent understanding of mentoring, as they had displayed with the notion of a ministry leader being a “servant”. This may be related to mentoring not being part of the organization’s leadership training focus, with mentoring as something that leaders do as part of being a leader.

Although the host organization provides a training program that promotes a shared culture, it does not have formal mentoring training or mentoring programs in place. Rather, mentoring is assumed to take place as part of one’s leadership role. During a focus group, executive leaders explained that mentoring is part of their responsibilities; they are expected to groom leaders “to find a replacement for [themselves]”. Instead of the mentors holding a common conception of mentoring, one of three mentoring functions\textsuperscript{3}, which emerged from the analysis, was found to be dominant in each mentor’s conception and, consequently, approach to mentoring. These conceptions are mentoring as (1) sharing of experience; (2) facilitating toward particular ends; or (3) coaching for leadership.

8.2.1. Sharing of experience

Based on their interviews, mentors who did not expect to direct the conversation to meet prespecified goals, such as steering the conversation toward leadership challenges being faced within the organization or achieving conceptual depth in discussions, stated that they were satisfied with their experiences in the CLM. These mentors, Mentor 8; Mentor 9; and Mentor 10, focused on sharing their experiences or insights with their mentees, responding to mentees’ questions, or supporting mentees in their personal reflections on topics. In comparison with other mentors, they relied less upon quick, successive communication with their mentees and were not as unsettled by time delays when communicating with them. During their portfolio reviews, mentors and

\textsuperscript{3} Kram (1985) describes mentoring functions as “those aspects of a developmental relationship that enhance both individuals’ growth and advancement”. (p. 22)
mentees who displayed this reciprocal sharing of experiences in discussions were found to have an appreciation for the mentoring relationship; what was learned; what was shared; and the organization or faith.

Further, in those relationships in which the mentor shared personal experiences, mentees felt supported in becoming a leader. When mentees viewed their mentors as people who could relate to their issues, the mentees appeared more willing to share about their own personal experiences. All mentees wanted to learn about how mentors approached and thought about situations they faced in life. Instead of their being probed to think more deeply about the audio material, they preferred gaining insight on how to apply what they were learning to situations they expected to face as leaders. For instance, one mentee explained how the sharing approach contributed to his mentoring experience after having been re-matched with a new mentor. Mentee 9 stated,

> It was just [my mentor’s] responses...just felt very comforting and um very understanding...even if there was just one post for me and one post for [my mentor], I just felt like the conversation was already going to be really good. Just hearing what [my mentor] had to say and... hearing what I had to say was already like really good...it just made me smile for some reason whenever I’d read...something from [my mentor]...It was just different [from my previous experience]...like things [Mentor 9] said....I was just like "Wow, this is so good. I can actually take that message and take it home – and really take it and use it."

On his part, Mentor 9 attributed the rewarding nature of his experiences, during the CLM, to reciprocity in sharing. Mentor 9 stated,

> I think mentoring isn’t really more about you [imparting] what you know unto them. I think you can – you contribute to that, and you help in their learning, but at the same time you also learn...and get something back out of it. Yeah. And even still... up to today, even though I’m say the [ministry executive] head, sometimes I get more out of it because they have such insight [when] they share.

4 Students rated mentoring relationships most positively when their mentors shared stories and insights with them online (Bierema & Merriam, 2002).
Sometimes a mentor was unaware of the value a mentee placed upon having his mentor share an experience or insight about leadership situations. For instance, although Mentor 7 was concerned that his sharing of personal experiences might overstep his mentee’s boundaries, this was not the case. In fact, his perspectives and insights were valued by Mentee 7 because these were perceived as adding to knowledge and experience, which could then be applied in life.

Mentee 10 expressed this same appreciation for what both his mentors had shared in terms of their insights and experiences. Given that leadership, within this organizational context, was a novel experience for many mentees, having a mentor share new insights, perspectives, or personal stories with them provided a means to scaffold the mentee’s experience and knowledge about Catholic leadership. As Mentee 8 said, he perceived his mentor’s stories as giving him “hope” that being a Catholic leader was possible.

8.2.2. Facilitating to an end

As revealed by the portfolio review, some mentors gauged the effectiveness of their mentoring approach by what their mentees chose to share with them in discussion. During the portfolio review, when asked about what they found significant in their exchanges with their mentees, all mentors attributed the significance of at least one note or exchange to its being able to provide them with information on how to support their mentees. However, when asked about how they used this information, Mentors 6 and 7 took a facilitative stance. Specifically, they used the information to orient and then gauge their success in guiding a mentee’s thinking toward a particular purpose or stance.

Contrary to their expectations that facilitating the discussion would be easily afforded by the CLM environment, Mentor 6 and Mentor 7 found that the time lags experienced in the asynchronous mentoring environment made it difficult to reorient discussions effectively5 (see Challenging Case). Mentors who took a facilitative

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5 In reference to an e-mentoring environment, Bonnett, Wildemuth, & Sonnenwald (2006) state, “Time lags in responding can hurt a pair’s momentum if not properly managed.”
approach in the CLM found their role challenging because this approach necessitated quick replies to generative questions, which were used to open discussions, followed by facilitative techniques to guide the discussion toward a desired end. Using probing questions to understand a mentee’s perspective was found to be ineffective because days or weeks could pass before a mentee replied to a mentor’s question. Moreover, focusing one’s attention on depth of understanding sometimes required that the mentor and mentee review audio material again to respond to probing questions, thereby lengthening the time lags between replies. Thus, the facilitation approach was not as effective in moving forward the discussion in the way the mentor desired, and the mentor became uncertain about how to guide the mentee toward the particular end being sought, such as that of guiding the discussion toward the practical application of Catholic leadership. In reference to facilitating the conversation through the use of generative and probing questions, Mentor 6 stated,

I don’t know how effective those kinds of gateway questions are in this sort of environment because...[my mentee] can’t bounce the ball back to me right after, where I can modify and change it. I can’t do that [because my mentee] answered it in a very yes-and-no-like-fashion...It was [answered as though it were] a closed question, like “I don’t think so,” where I meant to [ask] “how” questions, but [my mentee] answered [them]...as if I had said, “Do we or do we not?”....But, by the time I was able to get back to [my mentee]—it was like we were—we were in another place [in the discussion] already.

Mentor 6’s experience echoes that of Mentor 7 (see Challenging Case). Mentor 7 was concerned about not being able to probe into topics deeply and was unsure that his mentee had read his notes and questions. These concerns were exacerbated because weeks would, sometimes, pass before notes were exchanged between them. Within this environment, one of the challenges in using the facilitative approach is the uncertainty that comes with not being able to gauge how mentees are responding to mentoring, because they may not answer questions directed toward them and simply move on to other topics. Like Mentee 7, mentees may not think it necessary to share their experiences or respond to questions.

In a sharing approach, less emphasis is placed upon the mentee’s need to respond to a particular question, because the conversation is given the flexibility to
develop in different directions. In contrast, a facilitative approach is one where the mentor focuses attention on the mentee’s perspective, with the intention of steering thinking toward the various aspects of a particular topic. This kind of facilitative approach may have been reinforced by the facilitation training that all leaders of this organization undergo. However, this training is geared toward face-to-face, small group facilitation sessions, not online mentoring discussions between a dyad. Thus, the techniques typically learned, by leaders, in the organization may not transfer effectively to the CLM, as it has been designed.

Another challenge with this approach is that discussions may be steered toward topics that mentees may not view as relevant to their situation or, conversely, the discussion may shift from one topic to the next as mentees search for one that is more relevant. In both of these cases, mentees may not articulate their experiences to their mentors, which may lead mentors to question the techniques being used to support their mentee’s growth. While reevaluating the utility of one’s approach can be beneficial, it might lead to misplaced doubt and inaccurate attributions regarding the efficacy of mentoring (see Challenging Case).

8.2.3. Coaching for leadership

Another approach, which was applied by Mentors 4 and 5, emphasized coaching. In contrast to the other two approaches, a coaching approach requires that mentors have a better understanding of how mentees perform in practice, because the former’s main role is viewed as guiding the latter in their attitudes, motivations, or performance such that particular goals are achieved. Within this approach, guidance is meant to be specific and often entails observation (D’Abate, Eddy, & Tannenbaum, 2003). However, within the context of a virtual mentoring program, the only context provided to the mentor is that which the mentee discloses in discussion. Unless a

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6 Although coaching and mentoring are often used interchangeably, these are considered distinct concepts within the literature (D’Abate, Eddy, & Tannenbaum, 2003). Within the mentoring literature, coaching has been listed as one of the functions of mentoring (Kram, 1985).
mentee is forthcoming, this kind of information may be difficult to obtain\(^7\). Mentors 4 and 5 stated that they required more context than that provided in the CLM’s mentoring environment to mentor effectively. Both stated that they needed to be well-acquainted with their mentees to know how to motivate and help them perform better as leaders. They felt limited by the CLM environment in their ability to assess their mentees’ needs effectively. Echoing Mentor 5 (see Discontinued Case), Mentor 4 stated,

> I think the it for me is like some sort of connection past [my mentee’s] name or…login or whatever, because I think even doing let’s say something over like Facebook, like let’s just use that as an example. …If I saw what was on [my mentee’s] Facebook, I would see...who [my mentee’s] friends are, what [my mentee’s] life is like and that, I think, would create a dimension for me. It would create a personality for me that I know...which buttons to push and which buttons not to push. It creates more...boundary lines, I guess, because you can put whatever Mentee 4’s saying...more in context of...what the [audio] material is in context to [my mentee’s] life.

With the coaching approach taken by Mentor 4 and Mentor 5, the virtual environment slowed the pace of communication to such an extent that they perceived it impossible to develop the rich relationships they believed necessary to coach mentees appropriately. The design of the environment may present an obstacle to the coaching approach that may be difficult to overcome. As Mentor 5 stated, “I guess if there was [even] a little bit of success with the goals that we’ve put in place…but even those goals are not yet existent (laughs), so I don’t know if there’s anything about [the mentoring program] I like.”

While a coaching approach works effectively in a face-to-face situation, the approach, when used in an asynchronous online situation, limits the kinds of knowledge that these mentors use to assess their mentees’ potential, attitudes, decisions, and leadership performance. In the virtual mentoring environment, especially when using platforms such as Knowledge Forum and Audio Re-Searcher, a mentor is unable to observe the mentee in an authentic leadership situation. Moreover, since mentors are not directly responsible for the performance of their mentees as leaders, mentors may

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\(^7\) O’Neill and Gomez (1998) discuss the issue of visibility when working in a telementoring environment for science students. In their study, they found that successful mentoring relationships depended on the degree to which mentees could articulate their ideas or the extent to which they saw mentors as more than a resource person.
not be in a position to provide direct guidance to mentees. For instance, Mentor 5 could not attend meetings to observe how his mentee performed in a leadership role. Thus, Mentor 5 did not feel that his approach and the one afforded by the program were a good fit. Within the context of this study, the mentors who were striving toward a coaching role did not find the environment conducive to building the kind of relationship required for their mentoring approach to be effective. Ultimately, Mentors 4 and 5 stated that they found it difficult to continue in their role and discontinued their participation in the relationship.

Collectively, these findings reveal that different beliefs about the nature of mentoring must be addressed when designing a mentoring program. One way to address the fit, between this mentoring program and the mentors’ varying approaches, is through the provision of training that orients mentors to use the sharing approach found to work most effectively within the CLM. These findings can be used to set expectations about the mentoring experience, which potential mentors can also use to decide whether or not to accept the mentoring role. In addition, the discontinuation of mentors’ participation necessitates that a process for re-matching, when such events arise, be considered. Both the fit of mentoring approach with the CLM and re-matching will be discussed in greater detail in Chapter 9: Considerations for the Future Design and Implementation of the CLM.

8.3. The Role of Relationship in Mentoring

Mentors who believed their role required that they take direct responsibility in guiding their mentees’ behaviour and thinking tended to view a well-developed, close relationship as being a prerequisite for effective mentoring. These mentors also used perceptions about the level of intimacy they had with mentees to assess engagement. Mentors using a sharing approach, however, did not necessarily see a relationship as being required to begin mentoring; rather, they anticipated that the relationship would progress over the course of the mentoring process. While hesitancy to share personal experiences, until after the relationship had been established, was found among those who used a coaching or facilitative approach, this hesitancy did not appear in interviews with those who used a sharing approach. While sharing mentors recognized the
importance of relationships to the mentoring experience, they did not wait for the development of a close relationship before they began to share experiences and insights with their mentees.

CLM mentees, for their part, seemed less concerned about the quality of the relationship and more concerned about the kinds of insight and understanding they could receive from an experienced leader. As Mentee 5 stated, the relevance of the topic prompted and drove discussion, not the quality of the relationship. The significance of a topic’s relevance was also noted when Mentor 8 stated that the topics discussed were relevant to what his mentee and he were experiencing in their own lives. Mentor 8 stated that his conversations with his mentee remained on topic. Yet, as Mentee 9 experienced, a relationship established through the sharing of experiences, insights, and interests made his mentoring experience more fulfilling than it had been in his prior match. While other issues, such as the timely exchange of notes, also played a role in developing relationships, establishing rapport early during the mentoring process was important to supporting the development and maintenance of the relationship, over the course of the program (see Complementary Case). This rapport, however, did not need to be highly developed before mentees were willing to receive insights and advice from their mentors.

Mentors who sensed that they were contributing to the development of their mentees or who experienced reciprocity and mutual learning, from the kinds of exchanges shared, were found to remain in the CLM and were more content with the mentoring experience (see Complementary Case). This was observed in the experiences of Mentors 8, 9 and 10. The mentoring also had to be an experience from which the mentees believed that something could be gained, since it was competing with other activities for the mentees’ attention. All mentees who remained in the CLM stated that they saw their respective mentors as providing them with insights into situations they faced. This was observed when Mentee 7 stated that he became more receptive to being mentored and began revealing his thoughts about his leadership challenges upon

8 The kind of rapport that is established early in the relationship has implications for the way it develops over time (Devins & Gold, 2000; Rickard, 2004).

9 Mutuality and reciprocity led to beneficial experiences for mentors (Kram, 1985)
realizing how he could benefit from mentoring (see Challenging Case). Despite the challenges Mentor 7 faced, during the CLM, he remained because of his commitment to the program’s goals and his feeling of responsibility for his mentee’s growth.

All mentees disclosed information about themselves, whether it be questions, stories, or perceptions about what was being discussed in the audio material. From what was observed in the online discussions and the portfolio review, however, mentees did not necessarily share about issues relating to leadership in the host organization. Rather, they shared about concerns or questions about leading from a faith-based perspective, which could involve situations either internal or external to the organization. The intimacy of the mentor-mentee relationship in contributing to the mentoring discussion was not found to be as important for mentees as it was for some mentors. Rather, confidence that their mentors would consider their ideas and experiences in a nonjudgemental manner was found to play a greater role in the mentees’ willingness to participate. As with Mentees 7 and 8, Mentee 9 stated, “Even when I opened up, [my mentor] wasn’t critical of what I said [n]or [did he] put me down… [Mentor 9] was very nonjudgemental in… responses, and I think that really helped me in the conversation and the mentorship.”

8.3.1. Relationship before sharing

Some mentors believed that a friendship was a prerequisite for effective mentoring. This belief was grounded in the assumption that friendships could provide cues for understanding their mentees’ motivations. In addition, some mentors believed that an appropriate level of trust must be established before one shared about personal experiences and that this level of trust was cued by the extent that they felt a relationship had been established with their mentees. Mentor 4 and 5, who used a coaching

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10 Mayer, Davis, and Schoorman (1995) proposed the following definition of trust, based upon a review of the literature and empirical studies: “[T]he willingness of a party to be vulnerable to the actions of another party based on the expectation that the other will perform a particular action important to the trustor, irrespective of the ability to monitor or control that other party.” (p. 712) Davis, Schoorman, Mayer, & Tan (2000) state that it is the most commonly cited definition of trust, according to Rousseau, Sitkin, Burt, and Camerer (1998), as it appeared in a special forum on the literature. Although, trust was not measured within this study, this concept seems most appropriate to describe the type of interactions described within interviews.
approach, found the CLM environment difficult because of the lack of contextual cues that they could otherwise find in person, by phone, or on Facebook. Mentor 5 found the pace of communication too slow to afford the kind of relationship needed to guide his mentee appropriately. These mentors asserted that they preferred to observe their mentees in person in order to know them well enough to gain an accurate understanding of their leadership potential. Mentor 4 described how the CLM environment hindered the building of relationship in the following quotation:

[T]he other big [challenge] for me was...not having as much like physical or even...face-to-face... a Skype-like interaction.... I don't have the emotional connection to [my mentee] because I kind of just see [a name] on the screen....[W]ith mentoring...being able to have an emotional connection with someone, for me, that's always how I was...able to [mentor]....[I mentored] through friendship at first....[The CLM] feels like “You’re paired; go [work].” Like, it wasn’t [designed with the intention of] “Let’s figure out where your [mentee’s] headspace is first, before we delve into anything.”....I don’t know if [an emotional connection] can be done [in this environment]. Well, maybe with social media, I think it can be done. In terms of the [CLM], because we can’t track that [personality dimension of the mentee] as much...within Knowledge Forum and [Audio Re-Searcher], then it [the emotional connection] can’t be done.

Mentors 4 and 5 focused on attempting to establish a relational connection as a prerequisite to the mentoring task. After two months in the program, Mentor 5 stated,

[W]hat I was trying to accomplish from our last conversations online [was] to get to know him more. I want to be able to establish that rapport; that relationship. Um, just to be able to get...maybe a snapshot of who he is because, you know, we’ve never met before.

When Mentors 4 and 5 found that the CLM prevented them from establishing this relationship, they discontinued participation.

Mentors 6 and 7 used a facilitative approach and did not see the environment as being prohibitive to mentoring or relationship building. However, Mentor 7 believed that he could have steered the discussion toward more engaging topics for his mentee had they known each other better. Mentor 7 stated,
Right now, we’re kind of gravitating toward small talk...I might know the challenges—the challenge might be identified [but] I don’t know what the feelings or thought patterns are behind that. I don’t know what the motivations are. I don’t know um anything more than “Here — here’s my problem. How can it be solved?”... I think it would help me in terms of approach...if I know where the person’s at...then, I can adjust accordingly. If I know what makes a person excited, then I can ride off of that [excitement about a topic and] get them going [in discussion]...[I]n some cases...convert that engagement on maybe [discussing] something off-topic and channel it in[to]...the topic at hand.

Mentor 7 also believed that having a closer relationship would help his mentee to be “more comfortable in terms of exploring [topics] with someone who’s essentially a stranger,” which would then lead to the more personal, informal, and reciprocal conversation that Mentor 7 associates with mentoring. Mentor 7 explained, By knowing the person, I think [our relationship would be] a little more natural.... [I]n my opinion, mentorship [is] conversational and... informal, where the guard is essentially down and you’re sharing just, you know: “Here are my thoughts. You don’t have to agree with me, but here’s where I’m at. Here’s how I arrive at this.” And, you know, pick at things. Explore things, sometimes...I think there’s so much more colour that could be had in a conversation if you know a person.

From the above quotation, one can see that Mentor 7 wanted to reorient his mentoring relationship to one that involved personal sharing. However, prior to reaching this level, he believed that a certain comfort level was needed before his mentee would be receptive to this kind of personal exchange (see Challenging Case). However, unbeknownst to Mentor 7, his mentee had already reached that comfort level and stated that there was nothing that they, as a mentoring pair, could not share with each other (see Challenging Case).

The CLM provided opportunities for a mentor-mentee pair to meet through a videoconferenced orientation session and to become acquainted with each other through discussion. However, this environment did not easily afford the type of personal connection that those inclined toward a coaching or, to a lesser degree, a facilitative approach might need to mentor effectively. This has implications for the design of the CLM.
8.3.2. Relationship through sharing

Mentors who employed a sharing approach to mentoring tended to focus less on relationship building, prior to mentoring and sharing experiences, and more on building a relationship while mentoring. This approach complemented mentees’ expectations, since they were more interested in what they could learn from their mentors than in developing their mentoring relationships. Within the context of the CLM, mentees expected mentors to give them advice about and provide them new perspectives on how to be a Catholic leader. They wanted to learn from their mentor’s experiences and have a “sounding board” for their ideas. As such, mentees expected to receive advice and new insight from their mentors’ experiences, which they could then use as they saw fit within situations they faced.

As previously mentioned, knowing that his mentor had gone through similar experiences in the past and could provide him with meaningful insights was more important to Mentee 7 than having a friendship with his mentor. While Mentee 8 stated that the good rapport established with his mentor at the orientation session was important for the mentoring relationship, he did not need to have a close relationship to benefit from Mentor 8’s insights. As with Mentee 7, Mentee 8 knew that he would gain greater insight about what he was learning from the audio material through his discussions with Mentor 8. Consequently, Mentee 8 wanted to and did reestablish communication with his mentor, after a period of non-communication.

While Mentee 8 appreciated the rapport with his mentor, because it helped to foster openness in their discussions, he was hesitant to refer to Mentor 8 as a friend. During the early stages of the CLM, Mentee 8 described his relationship with his mentor as being similar to that of speaking with a priest. Similarly, Mentor 8 did not refer to his relationship with his mentee as being close. By the end of the CLM, however, Mentee 8 stated that he was grateful for his mentor’s having treated him as a “brother”, even though he would not call his mentor a close friend. Mentor 8 attributed the smooth development of their mentoring relationship to his having shared about his experiences first (see Complementary Case). Pair 8’s experience shows that the sharing of experience, prior to having a well-developed relationship, can lead to feelings of respect and trust, thereby further facilitating the development of the relationship. In this case, the
mentor-mentee relationship developed through the mentoring process. Over the course of the CLM, the relationship between the mentor and mentee became stronger as they revealed their perspectives and insights, through the notes they exchanged with each other on Knowledge Forum. A similar experience was experienced by Pair 9 and, to a lesser extent, Pair 10.

It is the mentees’ belief in their mentors’ ability to support them through mentoring that took precedence over having a good relationship prior to mentoring. Even if a mentor is not aware of how he has influenced his mentee, this lack of awareness does not mean that the mentee did not benefit from or appreciate the mentoring received, nor does it mean that the mentee did not believe there to be a mutual relationship. As seen in the challenging case, Mentor 7 was unaware of the way in which he had influenced his mentee. Yet, Mentee 7 stated that he had gained new understanding about his faith and believed that his mentor could relate to his challenges in leading within a secular world. Although Mentee 7 believed that his mentor and he were mutually open with each other, he did not perceive them to have a close relationship. However, Mentee 7 viewed advantages in having a mentor with whom one is not well-acquainted because that person’s distance from the mentee’s situation might provide for new perspectives.

### 8.4. Attributing Responsiveness to Interest

Out of the mentor-mentee pairs who participated in the CLM, six pairs contributed at least one post-and-reply on Knowledge Forum. Participation was influenced by several issues including time challenges; difficulty accessing technology; loss of interest; and poor fit between participants’ assumptions about mentoring and the design of the program. Given the existence of such obstacles to participation, knowing how some participants overcame them is important. One finding that emerged from this study relates to how quickly mentors and mentees began to apply themselves to the task given to them.

Those mentor-mentee pairs who immediately began to apply themselves to the mentoring task were ones who perceived themselves as having a smooth mentoring
relationship. While it was not always the case that one member of the pair would follow the initiative set by the other member, some mentors and mentees were motivated by the other member’s initiative to invest effort in the discussions. Moreover, this initiative was often seen positively by the other member of the pair.

This dynamic is evidenced in how Mentee 10 viewed his mentor’s quick initiation of the mentoring task. Mentee 10 stated,

[My mentor] kind of went deep dive into this stuff right away, which was surprising to me, and it was cool. Like, [it was] showing that he was really open right away to being a mentor.... [Mentor 10] showed... initiative. [For example] getting a message from [my mentor] saying, “Hey, I posted something,” or “I listened to this,” [or] like “Oh, yeah, I could—should probably do that,” [or] just [receiving] another reminder [to check Knowledge Forum] and showing that he has...an interest, made me go, “Oh. Like, he’s doing this for me, so I should probably...invest my time in it also.” And it made me want to invest more time into it because he was putting in stuff into this...[my mentor’s initiative] kick-started it right off the bat.

On his part, Mentor 10 explained that he asked Mentee 10 to select the topic to be discussed, and his mentee responded quickly. Mentor 10 stated,

I think maybe it just started—we just jumped right in, um, but basically [my mentee]...brought forward the topic. I think it was Talk 2. [Mentee 10] said, “I want to talk about—I want to listen to Talk 2.” And then [I was] like, “Okay, so let’s listen to Talk 2.”

As can be seen, both mentor and mentee responded to each other’s request quickly and began to work on the mentoring task.

In other cases, it was the mentee’s initiative that encouraged the mentor. For instance, Mentor 9 stated,

11 Bonnett et al. (2006), in their e-mentoring study, found that “to kick-start the conversation and keep that momentum going, participants should jump right in to specific content and should be sure to respond to all content in their partner’s previous messages in order to minimize the negative effects of time delays.” (p. 54)
From the first entry I read from [my mentee], I was really impressed by how much [my mentee] really opened up and was really honest and truthful with everything that [was] said, because to tell someone, a stranger—the biggest challenges you have spiritually is not the easiest thing, and I was just really impressed by how open and how detailed [Mentee 9] was in…all the discussions…and it just made it then so much…easier for me to reflect back [my mentee's actions] and be as open and as honest as possible. And [my mentee] was very open to all the advice and things…that I had mentioned.

In contrast, when mentors perceived a lack of response to their questions or suggestions from their respective mentees, mentors often questioned their own approach; the mentees’ interest level; or the mentoring environment. This was clearly illustrated in Mentor 7’s experiences. Throughout the CLM, Mentor 7 continued to grasp for clues on how to move the relationship forward, and he became increasingly cautious in his communication with his mentee, in order to avoid overstepping boundaries in their mentoring relationship.

A key challenge for a mentor and a mentee was how to approach each other after a lapse in communication. While Mentor 8 and Mentee 8 did not find the resumption of communication difficult, others found it challenging. One issue that became apparent is that some participants perceived mentors as being responsible for ensuring the success of the relationship because mentors assumed the role of the more experienced leader, responsible for supporting their mentees’ growth. In these cases, it was assumed that the mentor had more power and, therefore, more accountability for the mentoring relationship. When a lapse in communication occurred, one mentor expressed concern about how to reestablish the mentoring relationship. Mentor 6 stated,

[N]ow that...we’ve had such a lapse in activity and contributions, um, it’s kind of gone back to where I feel more accountable. You know, I’m the mentor, right. I feel more culpable that this hasn’t been as consistent.... I’m trying to...encourage [my mentee] to continue....So, I’m trying, you know, I’m kinda courting [my mentee] to...try this again.

Mentor 4 expanded upon this concern:

[I]t’s kind of like, you know, you’re not being able to deliver what you had originally planned to or agreed to....if you haven’t been able to do
what you said you would do, I feel that—for me anyway—I don’t know where the level of trust is anymore. So, I’m kind of like, “Do I go in?” Like, how do I go back in to kind of adopt...the role when I kind of haven’t been playing that role, and...then how do you kind of go in and like [say], “This is what I think.” And then it’s kind of like when you’re with friends and they...haven’t been doing what they’ve said, and you’re kind of like, “Well, yeah, yeah, yeah, yeah. I kind of half-believe you because...you haven’t kind of proved to me anything.”

The challenge that was experienced in these situations was how a mentor can resume mentoring and overcome any potential negative influence that a significant lapse in communication might have had on the mentor-mentee relationship. In these cases, a coordinator may need to intervene to encourage both parties to continue to communicate, especially when a mentor is unsure about how to proceed. In some cases, however, a re-match may be required. For all cases, in this study, mentees were open to resuming communication with their mentor after I, as coordinator, spoke with them about the situation. For instance, despite Mentor 4’s concerns, Mentee 4 confirmed that he was open to resuming the mentoring task, even after a significant lapse in communication.

While a concern existed when there was a lapse in mentee participation, this concern did not translate into the belief that mentees were accountable for the lack of progress in the relationship or mentoring process. Rather, mentors and mentees attributed the mentees’ lack of participation to issues such as having other priorities; inexperience with mentoring discussions, mismatch with the program, or, as previously noted, an issue with the mentor’s approach. Even attributing a mentee’s lack of participation to a lack of interest was not viewed negatively, because the aim of the CLM was to promote interest in leadership among mentees who were believed to have leadership potential, but who were not necessarily interested in holding such positions.

8.5. Obstacles to Voluntary Participation

The CLM is a leadership mentoring program for volunteers, set within a Catholic voluntary organization. Thus, the CLM’s success is ultimately dependent upon whether unpaid workers willingly agree to allocate time to participate in it. Moreover, the mentors
and mentees are part of a larger voluntary association that relies on their service. Consequently, the mentoring program, in some ways, reflects the challenges to participation that are faced by the larger system of which it is a part. However, participation within this mentoring program is further complicated because the mentor is not directly responsible for the mentee’s performance and may no longer have a formal leadership role within the host organization. While a volunteer leader within the host organization commits to participate without remuneration, this leader is directly responsible for the growth of followers. This is not the case in the CLM. Further, as mentioned earlier, the CLM mentees were not necessarily committed to leading within the organization; therefore, their commitment to the CLM could not be guaranteed.

Within the context of this study, these issues surfaced with mentors sometimes indicating that their lack of direct responsibility for the host organization weakened their commitment to the mentoring, as other priorities competing for their time arose. Mentor 4 stated,

I don’t have...as deep a vested interest in it [as] I used to, like I mean, in comparing to how it was when I was a leader in [the host organization]. I was pretty vested...and now my interests are not ...like we’re active in [another ministry within the organization], but it’s not as, like, vested as I used to be. So...I think for me that’s where I kind of feel that it’s different, because like my—there isn’t as much of a vested interest for me...in doing it because my ...link to the community isn’t as strong as it was before. And it’s not like I’m really as concerned as I was before in building up someone, because it was so direct before.

Mentor 5 also weighed the benefits of participating in the program with how much he felt he could contribute to its success, given the other activities that competed for his attention. He stated,

I’m very skeptical [about] how much we’ll be able to accomplish....I know the scheduling problem will always be there, even if we set a regular schedule. With my work, it’s very difficult to commit to that—[it is] not just my work, but also with [service within another ministry of the organization]. With all of the things that [I] have going on... I have to set, of course, priorities, right? And...certain things take greater importance. So I guess that—in that sense also – it’s very difficult for [me] to be able to say this [the mentoring] is going to be a complete success.
Mentors who continued to participate cited time as the main reason for not participating to the degree that they would have liked. For instance, Mentor 9 stated,

[My mentee and I have] only had a total of three discussions...but the first one went so well that it just really made us excited and look forward to the next one. You know, the only thing — challenge that we had was our time.... So putting the time in to do it and stuff, but... it was really wonderful.

Mentees also faced time pressures from other commitments, including work and school. Once mentees accepted opportunities to lead, as was the case with Mentees 8 and 10, they increasingly spent their time within these leadership roles and less time was available for them to participate in the mentoring program. For instance, Mentee 8, who partly attributed his acceptance of opportunities to coordinate events to his mentor’s advice to say “yes” to such roles, explained that his new responsibilities left him with little time to participate in the mentoring program. Mentee 10 echoed Mentee 8’s experience. Mentee 10 stated, “I think I just got— I committed to too many things at one time...It kinda all got stacked up.”

Decisions must be made in recognition of those issues that drive and challenge participation because the success of the CLM depends on the participation of both members of the dyad. In light of this, Mentee 10 stated,

I think ultimately when you have — when you’re communicating with someone online, and in... a turn-base[d] system, it’s really dependent that both are invested at the same time. Cuz if one of them lose[s] interest or [is] not involved, then the whole thing breaks down. Then, it’s really hard to get back into it once that—that communication has stopped, I felt.

These issues require design decisions about re-matching, program goals, the selection of mentors and mentees, and program integration into organizational structures.
8.6. CLM Communication Affordances

Scheduling issues could potentially be lessened in an asynchronous environment, because the members of the dyad do not need to meet at the same time. As in the case of Pair 8, the CLM only required the dyad to implement a communication plan and notify each other of posts made to Knowledge Forum. Moreover, the asynchronous nature of the CLM affords the time each needed to reflect and to write a note to the other pair member (see Complementary Case). However, weak or inconsistent communication can dampen these scheduling and reflection affordances.

To promote efficient communication, participants were advised to exchange contact information and to develop a process for notifying the other of their availability and posts. Despite these efforts, communication was found by many to be less efficient than they desired. On the other hand, participants who continued participation found that the environment promoted reflection. These two findings, perceptions about efficient communication and reflection through writing, have implications for design that are at odds with each other. Understanding how these two issues contributed to the mentoring experiences and relationships of participants is, thus, important.

8.6.1. Prioritizing efficient communication

Given that many participants were attempting to balance multiple responsibilities that demanded their time, mentors and mentees were concerned about efficiency in communication, specifically with ease of communication and mobility. An automated system for notifying participants of posted notes, the use of Facebook and other modes of communication, and mobile access were mentioned as ways to improve the usability of the mentoring environment.

Delays lead to greater time lags

Within the CLM, scheduling became more difficult when the mentor and mentee became extremely busy and had not established a communication pattern for
mentoring. During the CLM, Mentor 7 found it difficult to schedule a block of time for mentoring because he did not know when Mentee 7 would post in Knowledge Forum. Because of his busy schedule, Mentor 7 stated that he might not be able to respond to new posts in a timely manner because of other commitments he may have already scheduled in the interim (see Challenging Case). In addition, time lags between posts sometimes required more time to be spent reviewing audio material prior to responding to notes (see Discontinued Case).

**Notification system**

During the orientation session, participants were asked to communicate with one another via text messaging or e-mail, especially if they were to go on vacation or to take an extended time off from participating in the CLM. Participants were asked to develop and establish a communication plan with each other. They were also informed that they could use text messaging to notify each other when they posted notes in Knowledge Forum.

At first, I emphasized that participants set expectations for accessing and posting notes on Audio Re-Searcher and Knowledge Forum. However, after two months, most mentors and mentees had not developed or maintained a consistent communication plan. Moreover, not all mentors and mentees were messaging to inform one another about changes in their availability or to notify each other of notes they had posted. While a notification feature exists in Knowledge Forum, this feature had not been activated simply because I had not been aware of its existence during the implementation. Thus, the sending of text messages became the alternative notification system, which I encouraged participants to adopt. For some mentees, this alternative system worked. Mentee 10 stated,

> I thought it [asynchronous communication] would be easier, before, if I got notified [by Knowledge Forum]. But when I was with Mentor 10 [after the re-match], and [received text messages from my mentor] stating that [he had] posted something for me to read, I think that cleared that [problem] up.

This finding is consistent with literature stating that asynchronous environments can lead to scheduling issues and inconsistent communication (Bierema & Merriam, 2002; Mueller, 2004).
Those who developed a communication plan, which included keeping the other informed of changes in availability and notes posted, believed that sending these notifications, using text messaging or some other mode of communication, helped keep the mentoring relationship and experience smooth. This was the case for all three positive cases, including Pair 8 (see Complementary Case).

However, the use of notification systems may not resolve all communication issues. One reason why a notification, whether automated or sent manually by a participant, may not always be effective is that the notification may not always be seen or the receiving party may not always respond to the message immediately, as was observed when manual notifications were sent by participants. In some cases, a mentor or mentee was found to have notified the other of a change in availability but did not provide information on when the discussion could be resumed. To reestablish communication, one member of the pair needed to be committed to the mentoring program to the extent of initiating communication with the other member. To assist with these communication issues, the role of a coordinator was important in reminding pairs about the need to communicate (see Intervention Design). As with the notification system, however, a coordinator cannot guarantee that either party will follow through on establishing or maintaining communication, especially in the face of competing priorities for the participants’ time.

Facebook

Because I designed the research study to explore how the CLM environment afforded mentoring and relationship building, I wanted participants’ communication to remain within it. Consequently, Facebook was not initially recommended as a means for communication. However, some mentors and mentees began using Facebook in place of or in addition to text messaging or e-mail.

Facebook’s messaging feature quickly became a primary means by which several mentor-mentee pairs coordinated the mentoring task. In addition, members of Pair 7 and Pair 9 were known to have added each other as Facebook friends. Mentor 4 stated that Facebook afforded the establishment of rapport between a mentor and mentee because one could develop an intimate picture of another by viewing that
person’s photos, friends, and posts. This affordance was echoed by Mentor 10 who suggested that online profile information, similar to that found on Facebook, be provided within the CLM environment, thereby enabling a mentor and mentee to have more information about each other, prior to their official meeting at the orientation session.

Mentor 7 found it easier to contact and maintain communication with his mentee using Facebook (see Challenging Case). This experience made him wonder whether the CLM’s goals would be better served by using Facebook as the mentoring platform, in place of Knowledge Forum. Mentor 7 perceived Knowledge Forum as an outmoded platform because it ran counter to expectations that communications be well integrated with mobile technology or e-mail, which are tools used in everyday life. According to Mentor 7, Knowledge Forum could not seize the attention of its participants in the same way that Facebook could. Mentor 7 stated,

I don’t find the venue—the platform [Knowledge Forum] very social in nature, and I don’t know if that’s just a cultural phenomenon that we’re—we’ve all kind of gravitated or acclimatized ourselves to. Um, like, at one time—if this were in the nineties, where you know discussion boards were quite popular—then, I think that would drive a different behaviour. But, because we’ve kind of moved into the realm of social [networking] now…I kind of sometimes feel that we might be operating in something [Knowledge Forum] that’s a little bit archaic for lack of a better word… Just behaviourally…you have to exert more effort into doing this, and it doesn’t seem… as natural as say, for instance, we’re going to meet in a chat room, which is still kind of old now; we’ll meet in a chat room and we’ll have a live discussion.

**Go mobile**

Access to mobile versions of Audio Re-Searcher and Knowledge Forum was desired by participants. Mentors and mentees asked whether they could listen to the audio material using a mobile platform. They wanted to make efficient use of their time by listening to the audio material while performing another task, such as driving a car or performing a household chore. Given competing demands for their time, some participants found it difficult to remain at a computer and listen to the audio material using Audio Re-Searcher. Mentor 6 stated,

I actually thought—maybe I should just, [since] I’m doing laundry, record it onto my iPhone…then I’m like, “There’s probably copyright
infringement issues here,” but [I wanted to do this] just so I could listen to it in the car and then have something to write about when I get home, instead of having to sit.

8.6.2. Reflection goal

While efficient communication was important to participants, online communication mediated by social networking or mobile platforms is unlikely to afford reflection as effectively as the CLM environment. Mentee 8’s recognition of this trade-off is evidenced during one of our exchanges at T2. After becoming busy with leadership responsibilities, Mentee 8 asked whether he could listen to a copy of the audio material while driving, thereby making more efficient use of time. However, Mentee 8 then stated that doing so would hinder the kind of reflection afforded by Audio Re-Searcher and Knowledge Forum. Therefore, he would listen to the audio for the first time in the car to obtain an overview of the talk, and then he would listen to it again using Audio Re-Searcher to make notes on the material, reflect upon ideas, and write the Knowledge Forum note (see Complementary Case). Mentee 8 stated,

[I wonder whether] we have the possibility to [listen to the audio material] when we’re...in the car... because knowing that [I’m] getting busy ...[I know] sometime[s], [it] will help, in the car, to listen [to] it....Like I told you, [my process is] I listen [to] it one, two, three times [to reflect and then write notes]13... after, when I get home—when I say, "Okay, now I’m going to write my note," I [will] listen to it [again] on the Audio Re-Searcher.

Although this process of reflection and writing requires time, this activity was something that mentors and mentees who continued to participate in the CLM found beneficial. Mentee 10 stated,

I think when you’re - when I was asynchronous, it was easier to gather thoughts. Like I had time to...listen to something and maybe even re-listen to something and uh understand that talk better,

13 In his interview, Mentor 8 describes this process. It entails reviewing the audio material several times, with each successive review respectively corresponding to obtaining an overview of the material; note-taking; and writing the Knowledge Forum note, activities which promote reflection.
especially...for the audio stuff...like – it’s good that ...you have time to formulate a good question and get your thoughts down.

The insights gained through this reflective process prompted these mentors and mentees to engage in discussion, even when they were busy. Moreover, the CLM promotes the practice of reflection that those within the Catholic leadership community use. Thus, one must consider whether providing options for increased mobility or ease of access might limit the environment’s affordance of focused reflection.

8.7. Conclusion for Cross-Case Findings

The design-based orientation of this study, along with the case study methodology employed, provided for a systemic analysis of the mentoring experiences of mentor-mentee pairs. What is striking about these findings is that they reveal a variety of participant responses to the environment, diversity in beliefs about the possibility of building relationships, and differences in the meaning of mentoring among participants. This variation existed despite the existence of a common Catholic leadership culture in which the mentors had been trained as leaders. Participants made sense of events and challenges by filtering their experiences through the unique assumptions they held about mentoring and the role of being a mentor, mentee, leader, or member. Further, the attributions participants made about the influence of the mentoring environment on their experiences, in turn, influenced how they acted and shaped their own experiences. The issues that emerged in this cross-case analysis have implications for future iterations of the CLM. These implications will also be of interest to those who aim to develop similar programs. These design considerations will be explored in the next chapter.
Chapter 9.

Considerations for the Future Design and Implementation of the CLM

9.1. Overview

Informed by the issues that emerged from the cross-case analysis, I developed assertions about the design of the CLM, in keeping with the design-based orientation of this study. In this chapter, I begin by recalling and recapitulating the design of the CLM environment. Then, I put forth the developed assertions, which synthesize and build upon related findings in Chapter 8. I discuss the implications of these assertions for the improvement of the CLM’s design. These assertions also provide practical guidance to those considering the implementation of a program similar to the CLM. Some key considerations are

• determining fit between the mentoring approach and environment;
• coping with inevitable time delays in communication;
• creating opportunities to build relationship with what you have;
• developing selection criteria for mentees and mentors; and
• selecting an appropriate platform for the CLM.

9.1.1. Recapitulation of the CLM’s design

The CLM was designed to provide a structured mentoring environment for discussion, using audio material to promote reflection on Catholic leadership, with mentors providing insights that would make this material relevant to the lives of their mentees. This design was meant to develop understanding on what it meant to be a Catholic leader, especially within the host organization. Pairs were to select talks from audio material provided on the Audio Re-Searcher platform. Discussions on the topics
were to ensue. These discussions were not facilitated by the researcher. The mentors and mentees were to bring their own perspectives to bear on the topics (Spitzer, 2004). The researcher did not play a facilitating role in these discussions. Rather, each pair was to decide on how they wanted to approach the topics discussed so as to make them relevant to their own needs and experiences. During training, I asked each mentor-mentee pair to discuss and establish a communication plan for and approach to the CLM. Mentors were advised to set expectations for mentees. However, flexibility was given to mentors and mentees to negotiate how they were to approach the task. (see Intervention Design)

9.2. Consider the Fit Between the Mentoring Approach and Environment

Mentors were given the flexibility to approach the task in different ways. This design decision afforded research into participants’ perceptions about mentoring and how these perceptions influenced the approach used by mentors for this task. In addition, mentees’ perceptions about their mentoring experiences could also be studied in reference to the approaches used by mentors. The development of mentoring relationships, over the course of the CLM, could then be explored to produce insights on how these perceptions contributed to the mentoring experiences of each dyad.

Consistent with the literature, the findings of this exploratory study revealed that conceptions about mentoring within the environment varied (Jacobi, 1991; Kram, 1985). This variability was evident in the various ways that mentors conducted themselves in their mentoring relationships. Specifically, CLM mentors appeared to cast themselves in roles, reflecting mentoring functions, to which I refer as coach, facilitator, or sharer. While these varying approaches to being a mentor are not necessarily exclusive of one another, the practices of the mentors involved in this study could generally be classified into one of these three categories.
9.2.1. Guidance-oriented approaches

My findings revealed that those mentors whose approach was adapted from face-to-face coaching were unable to work comfortably and productively within this design of the CLM mentoring environment. Further, what I call the facilitative approach was conducive to learning, but its use was challenging. A main challenge for the facilitative approach involved communication lapses that made the use of generative and probing questions cumbersome to the development of discussion. I refer to these two approaches as guidance-oriented approaches, since these are used by mentors to direct discussion towards a specific end, such as improved performance or depth in discussion.

These guidance-oriented approaches did not necessarily afford the development of mentoring relationships within the context of the CLM. In the case of the coaching approach, mentors found it difficult to establish the connection they would expect in another environment. Coaches found the CLM challenging because they sought more information about the mentees’ performance, motivations, or attitudes than could be provided by the asynchronous, discussion-oriented design of the CLM.

Mentors using a facilitative approach aimed to guide mentees toward thinking deeply about the implications of topics for their own leadership, especially within the organization. However, within the CLM, the use of facilitation techniques did not further the goals that mentors had been trying to achieve. Mentor 6 stated that these techniques probably could work but that the time lags, between the posting of notes to the CLM environment, made it difficult to use these techniques effectively.

While the mismatch between the coaching approach and the mentoring environment presented an obstacle to participation for those mentors using it, the mismatch between the facilitative approach and the environment did not appear to be as major a hindrance to participation in the CLM, within the context of this particular implementation. For instance, Mentor 7 maintained his participation throughout the CLM, and Mentor 6 wanted to continue but could not because of scheduling conflicts. A potential explanation for why the coaching and facilitative approaches differ in their degree of mismatch to the CLM relates to the extent that these rely on cues external to
the discussion and mentoring environment to support a mentee effectively. While a would-be coach finds himself lacking in cues normally used to inform and signal the kind of support given to mentees, such as observing a mentee’s body language while leading a team, the facilitator will share insights but experience confusion on how to guide the conversation toward a particular end. While the coaching approach relies heavily on observation, which is not an affordance of the CLM environment, the facilitative approach still involves discussion and is, thus, more aligned with the CLM’s discussion affordances.

Moreover, the experience of mentees paired with mentors who used a coaching approach was disappointing in that the relationship did not continue. As re-matched Mentee 10 stated, it takes both members of the dyad to be committed to the mentoring relationship for it to work. Mentees who were matched with mentors using a facilitative approach experienced a greater number of exchanged notes; however, their relationships were not as smooth as they could be because of differences in expectations, as found in Pair 7’s case (see Challenging Case).

Mentees’ expectations for the mentoring experience were different from those of guidance-oriented mentors (see Cross-Case Findings). Mentees wanted to learn from their mentors’ experiences or insights as opposed to being assessed in their progress as a leader or questioned about their thinking. While these perceptions are only based on those of CLM mentees who participated in the interview process, this expectation is likely common to mentees in many online mentoring programs. Parallel to some of the findings presented here, O’Neill and Harris (2004) described the frustrations of mentors and mentees around what they termed the inquiry jumpstart role, in which mentors largely play the role of being a resource to mentees, rather than being partners in dialogue. Thus, even for the mentee, issues of fit are likely to be important. Implications for design will be discussed at the end of this section.

9.2.2. Sharing: A contribution orientation to mentoring

The way in which sharers approached mentoring within the CLM environment seemed most aligned with mentees’ expectations and provided for more satisfying
experiences between mentors and mentees, when compared to the approach of guidance-oriented mentors. For instance, re-matched Mentee 9 preferred his experience with a mentor who used a sharing approach. A plausible explanation for this fit may be that the sharing approach allows for greater flexibility in the expectations set for the mentoring process. Mentors do not need to have a well-developed relationship or understanding of their mentees to begin supporting them. In addition, mentors do not feel bound to use the discussion to achieve a particular end or to discuss a point further than what has already been shared between the pair, although depth and openness would usually be seen as beneficial. This flexibility in expectations works well because directing conversations toward particular ends is difficult when time lags exist or mentees prefer to move on to topics they view as more relevant, after the superficial treatment of a topic. However, the use of this approach also means that a discussion may not necessarily be centred on developing an understanding of leadership within the host organization, which is an issue that must be addressed because it is one of the goals for the CLM. Nonetheless, within the context of the CLM, sharing was observed to be more effective than guidance-oriented approaches in promoting relationship building, and it also provided for the insights that mentees expected from the program. I refer to the sharing approach as being contribution-oriented, or contributory, because these mentors believed it important to contribute their personal experiences and insights to the mentoring task. They gave this contribution priority over directing performance, eliciting perspectives, or facilitating the thinking of their mentees.

Interestingly, mentors who used the contributory approach did not view the differences between face-to-face and asynchronous virtual mentoring as being great, although they did recognize some differences, such as the lack of visual cues and the difficulty of using a question-and-answer style in online conversation. These mentors did not feel that the design of the environment was prohibitive to mentoring and the development of relationships. This advantage over other approaches is probably because the only requirements, needed by mentors using this approach, were the mentees’ participation and the existence of a forum to discuss their personal experiences on a topic with which they were familiar or becoming familiar. Again, making contributions to the discussion and task took priority over guiding mentees.
Now, a potential issue concerning fit may be that a mentee may not be one to share about experiences. It may be possible that the mentee may solely be seeking a mentor’s insight or feedback on ideas shared. However, mentors who used a contribution orientation did not necessarily expect mentees to share deeply about a given topic. They were more concerned that mentees derive some benefit from the topic discussed (Nakkula & Harris, 2005), rather than that a particular level of performance or understanding be achieved by the end of the program.

Within the course of this study, a good fit between mentoring approach and mentoring environment appeared to be a more salient design consideration than selecting for a good mentor and mentee fit. The design-based orientation of this study lent itself to the emergence of this finding because I explored the systemic relationship between the mentor-mentee pair and the CLM environment, as opposed to studying the effects of isolated mentor and mentee characteristics, such as interests. Given that mentoring is relational and situated, the identification and consideration of criteria, such as mentoring approach fit, derived from the study of mentor and mentee relations, in situ, would benefit those attempting to create successful mentor and mentee matches.

### 9.2.3. Implications for the CLM Design

An important implication of my findings is that the designer, when making decisions about the recruitment, selection, and training of CLM mentors, must consider the significance of having mentors’ share experiences with their respective mentees as a means for building rapport in the mentoring relationship. Kasprisin, Single, Single, & Muller (2003) stated that the characteristics of appropriate mentors, given the goals of particular programs, must be identified to enable their recruitment. While it might be considered more efficient to identify, attract, and select mentors who are already using or are comfortable with a contributory approach to mentoring, this recruitment strategy might not be easily implemented because the potential pool of volunteer leaders inclined toward this mentoring approach may be limited. Thus, training mentors on what to expect within the mentoring relationship and providing them with information on the contribution orientation might be a better method for ensuring that it be used. Mentors
can then be given the option to discontinue participation in the mentoring program should they feel uncomfortable with the type of approach recommended.

The training for the CLM could be enhanced by providing mentors and mentees with examples of how successful mentor-mentee pairs discussed issues. Lessons from the case studies could be used to provide mentors with an idea of what to expect from their mentees and what mentees expect for them to do, such as establishing a communication plan; being open with mentees about their experiences; and setting clear role expectations for both mentors and mentees. Moreover, the mentors and mentees could be provided with examples of how successful pairs approached discussions. Cases could also be used during the recruitment of mentors and mentees to disseminate information on the benefits that mentors and mentees have received through the sharing of their experiences and insights with each other.

My findings also indicate the importance of understanding how mentors conceptualize mentoring and mentoring relationships, which could be the first steps in refining the training for the CLM. While the organization had tasked leaders with mentoring members into leadership positions, it offered no formal mentor training. Because mentoring was learned informally, it was viewed inconsistently. In addition, the context of mentorship was different from that of the CLM. Thus, even though CLM mentors had successful track records for mentoring members into leadership in the host organization, the approaches that some mentors had used within the face-to-face environment did not translate well to an asynchronous and virtual one. Formal training for the CLM must address mentors’ conceptions about online mentoring and train them on those approaches that have been demonstrated to be effective within the CLM environment.

Although the mentees who were interviewed tended to be more consistent in their views about mentoring, my findings suggest that mentees could also benefit from training on how to communicate more effectively with their mentors. In particular, some mentees’ belief that the mentor set the tone for the relationship should also be addressed in order to provide for a more equitable view of the mentoring discussion (Bierema & Merriam, 2002; Price & Chen, 2003). For instance, mentees could learn
from Mentor 8’s suggestion that they view the mentoring discussion as more of a two-way conversation. Mentees can be provided with examples of how previous mentors and mentees communicated with each other for the CLM and, thereby, model their own interactions upon complementary pairs.

While the implications above assume that the CLM design remain largely unchanged, other implications involve the redesign of the CLM to support coaching or facilitation more effectively. However, given the fit between these two mentoring approaches and an asynchronous, virtual environment, the design of a mentoring program suited to these approaches may involve very different environments from that of the present CLM, especially if the aim is better support for coaching. Mentoring for coaching may be better supported through environments that can provide coaches with ways to assess their mentees’ performance, motivations, and reactions. Virtual environments that would be more supportive of a coaching orientation would include games, simulations, and virtual worlds.

Environments better suited to facilitation techniques, which involve quick turnaround in communication and different perspectives on a situation, might benefit from small group rather than dyadic discussions. Holding small group discussions may afford quicker turnaround times and may lead to more equitable expectations about the sharing of experiences and stories, since more people are likely to contribute their perspectives within a given time frame. In this way, the mentoring environment would make better use of the affordances that computer-supported collaborative learning (CSCL) environments, such as Knowledge Forum, have for supporting small group discussion. Alternatively, one could explore the use of social media platforms, such as Facebook, to support the facilitative style.

The issues that must be considered, therefore, are how to reconcile the mismatch between mentor and mentee expectations with respect to each pair member and the environment. It is yet unclear as to how best to assess these expectations and to make better matches. Some possibilities could include the use of pre-screening interviews that identify mentor and mentee preferences and expectations, which can
then be used to inform the selection, matching, and training to support the use of the approach most conducive to the CLM environment.

9.3. How to Cope with Inevitable Time Delays in Communication

9.3.1. Negotiate a communication plan

Periods of non-communication or lack of timely communication were experienced by mentor-mentee pairs, which led some mentors or mentees to question the lack of response to their messages in the mentoring environment or their attempts to coordinate communication with the other party. Attributions made toward the cause of non-communication may result in the belief that the other party is not interested in the mentoring experience, especially when trust has not yet been established within the dyad. These findings, coupled with Karcher, Nakkula, and Harris’ (2005) finding that relationship quality correlates with mentors’ perception of their mentees’ openness to seeking mentoring support, suggest that strategies for mitigating time delays between communications are needed.

Within the context of this study, a communication plan was critical to avoid participants’ guessing the reasons behind lags between responses. Those who had established a communication plan appeared to gain each others’ trust and, in turn, were observed to be more understanding during periods of irregular communication. While recognizing the time and communication challenges they experienced, those pairs who had established a communication plan viewed their mentoring experiences and relationships positively.

Implementing a consistent plan for communicating with each other, coordinating tasks, and notifying each other about availability was perceived as contributing to smooth relations between a mentor and mentee, as observed in Pairs 8, 9, and 10. In general, mentors were concerned about how to establish a consistent pattern of communication or how to reestablish communication after its lapse. Of the mentees who remained in the CLM, two of them had wanted to discontinue participation because of a
lack of communication with their mentors, but continued after each was matched with another more communicative mentor. After the re-match, the relationships developed smoothly as each mentor-mentee pair established a communication plan. It was somewhat surprising to find that pairs who used text messaging, e-mail, or Facebook to coordinate the mentoring task expressed satisfaction with their mentoring relationships even when they did not post Knowledge Forum notes to each other often.

Conversely, when a mentor and mentee did not communicate for coordination or notification purposes, one member of the pair usually grew concerned about the state of the mentoring relationship, task, or approach. Uncertainty limited the development of comfort or trust, for at least one member of the dyad, because expectations were neither met nor developed. This uncertainty sometimes led to changes in perception about the other member of the pair or to changes in mentoring participation that were not conducive to relationship building or positive mentoring experiences. As previously mentioned, automatic notifications can be provided when notes are posted, but such notifications do not ultimately replace the need for the mentor and mentee to negotiate and establish a means for communicating with each other, when they cannot find time to post notes.

9.3.2. Put plan into action quickly

As mentioned above, those who consistently implemented a communication plan stated that doing so contributed to developing smoother mentoring relationships. Moreover, those who were quick to establish and implement this plan appeared to generate enough goodwill to overcome periods of irregular communication. Furthermore, these parties felt comfortable contacting each other even after a lapse in communication, as was observed in Pair 8’s case.

On the other hand, those who did not quickly establish a communication plan were never able to implement one, with the exception being Pair 7 whose communication pattern improved after the jumpstart date, when the pair reaffirmed its commitment to completing the CLM. However, Pair 7 was also unique in that Mentor 7
was proactive in setting communication expectations, at the beginning of the CLM, and would occasionally contact his mentee by Facebook.

In cases where this plan was not quickly implemented, mentors who felt accountable for contributing to a lapse in communication found that they questioned their worthiness to contribute to the discussion. They were concerned about having lost their credibility to mentor their mentees. Their concern was valid because some mentees had begun to doubt their mentors' interest in providing support. However, when asked, these mentees were willing to work with their mentors again.

When a rhythm to the online communication was not found, even eager participants could become disengaged, as was the case for Mentee 4, Mentee 5, and Mentee 6. Disengagement can also result for eager mentors, as was the case with Mentor 7. Clearly, such an outcome is far from ideal in a program that aims to encourage volunteers to take on leadership roles. In such cases, restarting communication may require the intervention of a coordinator to ask the parties whether they are in a position to continue with the mentoring program. In some cases, circumstances may dictate that re-matches be carried out.

9.3.3. Implications for the CLM design

Asynchronous environments provide mentors and mentees the flexibility to coordinate their schedules based upon their availability, which is especially important within a voluntary organization wherein participants have different schedules. In recognition of the importance of setting expectations in formal mentoring programs, I developed the orientation session to provide training on the importance of establishing and maintaining a communication plan between the mentoring pair. Given that I wanted to explore how mentors and mentees negotiated and coordinated communications, I encouraged pairs to set expectations and recommended strategies for coordinating the mentoring task, but I did not prescribe a plan that limited their autonomy in negotiating the task. My findings revealed that this training did not work.

While several participants suggested that automatic notifications of posted notes be provided, these notifications would not be sufficient for resolving communication
issues in asynchronous environments. Rather, these are secondary in importance to the establishment of a communication plan between the mentor and mentee. Better ways of training for communication might be needed. Activities could include role playing or presenting real-life case examples on how others had set expectations and succeeded in developing a plan. Another option might be to provide mentors and mentees with the opportunity to formalize the agreement to commit to their communication plan and regular participation in the mentoring program, as suggested by Mentor 7.

**9.4. Create Opportunities to Build Relationship with What You Have**

As previously noted, mentors’ approaches aligned with how conducive to developing a mentoring relationship mentors viewed the virtual environment. At least one member of the pair tended to feel a lack of connection with the other in cases where the mentoring environment was believed to be prohibitive to relationship building (see Discontinued Case). In addition, coaching-oriented mentors, referred to as coaches, did not feel that the time allotted during the orientation session was adequate for establishing a mentoring relationship with their mentees. In fact, both of these mentors echoed the sentiment that they had never met their mentees, despite having met them using a videoconferencing medium. For these mentors, a face-to-face meeting was an important prerequisite to mentoring.

However, those mentors who viewed technology as not necessarily being prohibitive to the formation of mentoring relationships tended to view every interaction as an opportunity to develop the relationship. These mentors strategized about how to ensure that a relationship was established, maintained, or developed. In one particular case, Mentor 7 persisted in making use of opportunities to develop his relationship with Mentee 7, despite not having feedback that would have helped him to gauge the success of his approach. As a result, his mentee viewed him as a supportive mentor who was open to the mentoring relationship. While some might infer that these mentors were more comfortable and experienced with technology than coaches (Helsper, Johanna, & Eynon, 2010), this inference is unlikely to be reflective of the situation given that case mentors ranged in age from 32 to 35 years of age, with one mentor who was
27 years. Their background and age range place them squarely among those who are familiar with technology. Moreover, coaches might be considered more technologically experienced than some of the other mentors based upon the nature of their occupation or their interests (Helsper et al., 2010). Rather, the more plausible explanation relates to differences in mentors’ personal assumptions about mentoring and mentoring relationships, which were made evident as they worked in the CLM environment.

Mentors who had positive CLM experiences and viewed their interactions with mentees as opportunities to build upon their relationship did not see major differences between face-to-face and asynchronous, virtual communication. Specifically, these pairs were open to sharing experiences, and they developed and maintained a plan to communicate changes in their availability and to coordinate participation. Pair 8 and the two re-matched pairs fell within this group.

9.4.1. Implications for the CLM design

These findings suggest that mentors and mentees should be encouraged to use every interaction to develop their mentoring relationships. Moreover, the pre-screening of participants to select only those who believe that relationships can be developed within the CLM environment is recommended. Training could also be used to counter the bias that relationships cannot be developed within the environment. Participants could be provided with information showing that beneficial relationships, between mentors and mentees, have already been built within it. Mentor 9 recommended that tips be provided on how to develop a mentoring relationship.

Mentors and mentees can be made aware that their orientation sessions are a means by which they can become better acquainted with each other. Mentor 10 further recommended that the mentor and mentee be provided with the opportunity to become acquainted with each other prior to the orientation session. He suggested that each could create a CLM profile page, similar to one found on Facebook, on which each could share about interests and experiences.

The findings also suggest that it may be useful for the orientation to be split into two separate sessions. The first could focus on an introduction to the program and
provide time for the mentor and mentee to become acquainted with each other. The second session could be used to train mentors and mentees on how to use Knowledge Forum or Audio Re-Searcher. This second synchronous contact for the mentoring pair could provide an opportunity for further relationship building, through their working collaboratively to learn how to use the mentoring environment.

**More than just discussion**

These findings suggest that one design for relationship-building interactions within the CLM. Mentor 9 believed that “the introduction is key” in setting the tone for the mentoring relationship, consistent with Devins and Gold (2000) and Rickard (2004). While the orientation session was designed to facilitate relationship building, the session was not found to be sufficient in this regard by some mentors. Training could also emphasize that the CLM be conceived as a virtual safe zone where the sharing of experiences is valued, perspectives are discussed in a nonjudgemental manner, and conversations are kept confidential.

In addition, mentors and mentees can be encouraged to use various modes of communication for coordinating tasks to enhance their mentoring relationship. Text messaging was the suggested medium by which mentors and mentees were encouraged to communicate. However, some mentors and mentees added each other as friends on Facebook, which they found served as a convenient means for communication. Others used these other modes of communication, Facebook and text messaging, not only to coordinate but to become better acquainted with each other. Although I had considered the possibility that mentors and mentees might encounter each other in face-to-face situations in ways that might influence the online development of their relationships, I had not foreseen that mentors and mentees would desire to or actually use Facebook or text messaging as a means for relationship building. These informal, off-task conversations can be encouraged to foster relationship building, as evidenced in Pair 9, while also emphasizing to the pair that mentoring discussions remain in the virtual environment for reasons having to do with confidentiality.
9.5. Selection Criteria for Mentees and Mentors

9.5.1. Mentees must be open to mentorship

Aligned with Daresh (1995) and the design of this program, Mentees 7, 8, 9, and 10 agreed that those selected to participate as mentees must not only be interested in learning about leadership, but they must also be open to receiving mentorship. This aligns with mentors’ expectations in that they appreciated or sought this openness from mentees. Indeed, mentors valued the exchanges they had with mentees who shared about their experiences and engaged in discussion. These experiences contributed to a positive assessment of their experiences in the CLM, which is critical to obtaining buy-in for the program from the current leadership.

While not all mentees may be open to mentorship immediately, selection and training for this attitude would be beneficial to the mentoring relationship. However, the limitations of this strategy include difficulty with determining measures for openness and with assessing whether self-reports on these measures would be valid predictors of openness during the relationship. In addition to mentees’ being open to mentorship, they must also have the time to commit to the CLM. Mentor 10 notes this in the difference between his original mentoring match and subsequent re-match experiences. Yet, mentees might underestimate their commitment or might accept an invitation in order to maintain the favourable impression the executive leadership has of them. Thus, best efforts to recruit, select, or train mentees do not necessarily guarantee a successful mentoring relationship. These issues also obtain for mentors. As a result, re-matching strategies must be implemented.

9.5.2. Mentee’s level of experience

All who participated in the CLM believed that it would benefit those interested in leadership. Participants also agreed that future mentees should be those who have demonstrated this interest by participating in organizational activities and have shown commitment to the organization to some extent. While mentors and mentees agreed with these selection criteria, the participants’ opinions varied in terms of the experience
level needed for a mentee to benefit the most from CLM participation. Mentee 10 saw the CLM benefitting those considering the acceptance of new leadership roles, because mentoring provided “a deeper understanding of what leaders actually do and their mindset.” However, he also stated that for a mentee to benefit, a mentee should show “strong signs of becoming a leader.” Mentor 10 saw the CLM benefitting those with more leadership experience and believed that “it might be a good follow up or ....enrichment mentoring for established leaders.” Mentor 9 and Mentee 8 saw the CLM benefitting potential and established leaders.

Further, Mentee 8 believed that executive leaders, themselves, might benefit from the CLM and that the mentorship found in the program was, in some ways, deeper than the kind received from the organization’s existing leadership training. Interestingly, some of the executive leadership had shown interest in participating in the CLM as mentees. This was a surprise. In fact, after an executive leader found out who the CLM mentors would be, this leader asked whether it would be possible to participate as a mentee.

Alternatively, Mentee 7 believed that the CLM would be useful to the general membership. This perspective relates to his use of the CLM as a way to understand Catholic leadership in all contexts, which also happens to be the focus of the audio material. Therefore, it follows that he could see the general membership as deriving benefit from the CLM.

9.5.3. Implications for recruitment and selection of mentees

Within the context of the CLM, mentees were selected by the ministry’s executive leadership. Existing leaders chose those who had shown leadership potential and those who were newly appointed leaders as mentees. Potential was demonstrated by those who attended ministry events regularly or accepted tasks in the organization, such as facilitating small group discussions. Mentees were selected because the current leadership believed they might gain a better understanding of Catholic leadership in their lives. In addition, mentees included those members who hesitated in accepting leadership when asked.
Mentee recruitment may need to be conducted in two stages to increase the likelihood of selecting those who will commit and contribute to the CLM discussions. First, leaders can be provided with clearer criteria for targeting mentees. These include the aforementioned attitudes of being open to mentorship; availability; interest in leadership; and commitment to participation. In addition, an open call can be made to the general membership, such that those interested in leadership have the opportunity to self-select. Those considering being mentored can be provided with clearer expectations about what their participation would entail and, thereby, make more informed decisions about their participation. Mentees who are recruited can better assess their willingness to participate if they are also told about the time they are expected to commit as mentees. However, despite attempts at better recruitment and selection, potential participants may not realize the implications for their participation until they are actively involved in it. Decisions must also be made regarding how to encourage participation, while respecting the voluntary nature of being a CLM mentee. Re-matching may be warranted in certain cases, and it was found to contribute to positive experiences for those who had been re-matched.

9.5.4. Who should serve as mentors?

Another persistent design question is whether the mentor should be the direct leader above the mentee or a past leader who can share experiences with the mentee. Various perspectives on this issue exist. Mentor 9 saw potential for having the direct leader be responsible for mentoring the mentee. However, a focus group with the executive leadership revealed that many were too busy with their assigned tasks to assume the role of mentor. Meanwhile, Mentee 7 felt that a mentor who was not directly responsible for a mentee could provide for new insights that one’s direct leader might not be able to provide (Devins & Gold, 2000), especially when leaders and followers are quite similar in their views and experiences.

9.5.5. Implications for mentor selection

The answer to the question of who should serve as a mentor is likely specific to the organization’s resources, goals, and needs. Yet the diversity of opinions existing on
who should mentor reminds the designer to consider which level of the organization’s hierarchy would be most likely or best suited to act as mentors in such a program. Based on the findings of this study, considerations should include the availability and experience level of the current leadership. Another consideration is whether a truly open mentoring relationship can exist with an immediate supervisor, because the power relationship might lead a mentee to self-censor or do impression management. As previously mentioned, however, a good match among a mentor, mentee, and environment cannot be guaranteed. As such, re-matching strategies must be designed into the program.

9.6. Selection of an Appropriate Platform for the CLM

9.6.1. Knowledge Forum

Although participants found the basic version of Knowledge Forum easy to use, some of them believed that it afforded interactions that were not aligned with current expectations of online communication. While Mentors 6 and 9 appreciated the forum because they could easily contribute notes to a discussion, Mentee 5 wanted an environment that appeared less dated. Moreover, Mentor 7 expressed concern about using a knowledge-building forum as the primary mentoring platform when it was not integrated into the mobile communication systems used by CLM participants in their personal lives.

The comparative ease of access of social media, such as Facebook, was cited as a reason to consider social and mobile media’s integration into the mentoring platform or to consider using these in place of Knowledge Forum. Social media were perceived as being more able to afford information about mentees, which could be used to guide mentoring decisions and facilitate relationship building, than Knowledge Forum could.

While ease of access to both material and other participants could be afforded by a social and mobile media platform, ease of access is not necessarily the primary value of a mentoring program. Designers must consider that social media were primarily developed for recreational sharing, not for confidential mentoring. On the other hand,
Knowledge Forum was developed specifically to facilitate discussions for the purposes of learning and the development of new knowledge (Scardamalia & Bereiter, 2006), and it has been used for mentoring within educational environments in the past (O’Neill, 2004). However, the concerns of participants who found its basic version “dated” is important because it can negatively influence perceptions about the innovative nature of this virtual mentoring program and its research. Moreover, within the case of the CLM, ease of access and mobility presented significant challenges to the participation of some mentors and mentees. Thus, accessibility is a usability constraint that one must consider when designing the mentoring environment. A designer would be prudent to examine in which way mentoring goals and usability can be satisficed, when selecting and designing such a platform.

On balance, if Knowledge Forum provides an environment free from the distractions of social media, would its replacement by a social media platform, such as Facebook, detract from the kind of reflection and sharing that mentors and mentees found beneficial? Privacy issues for mentors and mentees also become a concern when using social media. For instance, ethical implications arise with respect to requiring mentors and mentees to have access to each other’s Facebook profiles, including pictures and posts normally reserved for relatives and friends. While it is possible to create special Facebook groups for the program, this possibility does not give mentors and mentees access to personal profile information beyond the group page. In this case, the contextual information sought by participants about one another becomes limited and, in many ways, so does communication because Facebook does not allow for threaded discussions nor is it easy to search for shared material or conversations (Meishar-Tal, Kurtz, & Pieterse, 2012). One benefit to using Facebook, however, was found by Meishar-Tal et al. (2012), who reported that the dynamic nature of social media posts contributed to intensity in discussions and quick responses when used in place of a learning management system. Ultimately, both the mentoring goals and the ethical implications of using a social medium, especially when sensitive information may be discussed, must be considered prior to making decisions about switching from computer-supported collaborative learning (CSCL) environments to social media platforms.
9.6.2. Audio Re-Searcher

Mentor-mentee pairs were trained to use Audio Re-Searcher to tag aspects of the audio that they wanted to discuss with each other. Some mentor and mentee pairs, such as Pair 9, preferred not to use it for this purpose. This pair preferred to use Knowledge Forum instead of Audio Re-Searcher to identify those aspects of the talk they wanted to discuss. This preference was shared by Pair 6 and Pair 8. However, some participants used Audio Re-Searcher as I had intended for it to be used. Mentor 10 and Mentee 10 used Audio Re-Searcher to notify each other on those aspects of the talk they found interesting. Mentor 10 used Audio Re-Searcher to gauge his mentee’s response to the mentoring. Like other participants, Mentor 10 found Audio Re-Searcher easy to use.

Participants used Audio Re-Searcher to listen to the audio material. However, over the course of the implementation, participants were informed that they could use Audio Re-Searcher for their own personal notes. This suggestion was followed by Mentee 9, who had been creating his own notes external to the CLM environment. Mentee 9 found Audio Re-Searcher useful for this purpose.

Participants suggested improvements for the usability of Audio Re-Searcher. Mentor 10 suggested that tags be given different colours to help categorize the different notes made. This may be useful for those wanting to differentiate among a mentor’s notes, a mentee’s notes, and notes used to identify aspects of the material to be discussed in Knowledge Forum. Mentee 9 also suggested that Audio Re-Searcher and Knowledge Forum be integrated into a single application, in order that one would not need to log into the two platforms separately. The development of an environment with the integrated functions of Audio Re-Searcher and Knowledge Forum could contribute to the sharing of insights, stories, and ideas about audio material in a more seamless way.

The initial requirements-gathering study showed that Audio Re-Searcher could be used to identify points of interest for discussion. Pair 10 used it in this way, and Mentor 10 stated that doing so gave him “a point of reference within the audio talk and gave…[Mentee 10] a point of reference, as well, in terms of which points of the talk [Mentor 10] found most interesting for [them to discuss].” However, the findings of the
CLM revealed that few pairs used Audio Re-Searcher the way they had been trained to use it for more than a brief period of time. Others preferred to use Audio Re-Searcher only to listen to the audio material and create notes. These latter findings were expected given that it was designed to afford audio material tagging and note creation for an individual learner (Zander, 2011). The hesitance of pairs to use it for a more collaborative purpose suggests that the training, design, or both need to be reevaluated to see how Audio Re-Searcher can be used more effectively within the CLM context. Future studies could focus on the note-taking function or investigate the potential of using Audio Re-Searcher for more collaborative purposes. Moreover, consideration must be given to the use of platforms that have integrated the functions afforded by both Audio Re-Searcher and Knowledge Forum.

9.6.3. Mobile access for the CLM environment

Existing research has found that reflection as a type of cognitive processing may be hampered by multitasking (Junco & Cotten, 2012). As previously mentioned, mobile access to the talks and the discussion was desired by some participants. However, a shift to include mobile versions of the mentoring environment would be likely to influence reflection negatively, since reflection may be inversely related to multitasking, which is the mobile media affordance that participants had hoped to utilize by having the CLM integrated with mobile communications. How strong this influence may be is an empirical question. Given that reflection was an outcome of the mentoring program that mentor and mentees found valuable for learning and motivation, this affordance is critical to the success of the CLM. Careful consideration of how mobile communications can or should be implemented is, thus, required if depth of reflection is desired as one of the goals of the CLM. Future studies may provide clarity and guidance on the relationship between mobile platforms, multitasking, reflection, and leadership development within the context of a volunteer leadership mentoring program.

Considering that many pairs used Audio Re-Searcher solely for its playback function, mobile access to the audio material might be viable. However, the density of the material required some participants to take notes, which Audio Re-Searcher affords. The degree to which notes can be taken in a mobile version of Audio Re-Searcher is
something that can be explored in future studies. Another option, which may help participants to process the audio more easily, might involve streamlining the 27-minute segments. This streamlining may require the development of a new set of material based on the existing series.

The use of a mobile version for the discussion forum requires addressing the relationships among multitasking, reflection, cognitive processing, and mentoring goals. While Knowledge Forum’s desktop version limits mobility, this version affords an environment that is more conducive to written reflection than would a mobile one. A mobile version may be more conducive to mentoring programs of a synchronous nature wherein ease of communication and just-in-time support take higher priority than reflection. Further insight into designing for different mentoring goals can be provided as future studies are conducted. Moreover, the relationships among certain mentoring goals, such as reflection or just-in-time support, to leadership development outcomes, such as commitment or role understanding, will require greater investigation as the number of studies exploring various forms of virtual mentoring programs for leadership development increases.

9.6.4. Material selection

The key issue for consideration is how to orient participants, especially mentors, to use the audio material to reach program goals, given the CLM environment. The material was meant to serve as a springboard for reflection on being a leader, especially within the context of the organization. The design intent for the audio material, given the reflection and sharing orientation of the CLM, is that it be used to provoke reflection on how Catholic leadership principles can be applied in practice and, then, that the mentor and mentee share with each other their reflections as a starting point for further discussion. This reflection does not preclude the development of conceptual understanding through the processes of reflection and discussion; however, the goal of the CLM is less related to developing conceptual understanding and more geared to sharing experiences on how the audio material relates to situations that leaders encounter.
In general, mentors and mentees found the audio material useful for learning about Catholic leadership, but Mentor 5, Mentor 9, and Mentee 6 also found the material too dense or “dry.” The orientation session could serve to provide examples of how various pairs had used the material to forward their discussions and how these discussions contributed to CLM goals. Mentors could be given training on the kinds of sharing that were shown to be effective within the CLM. For instance, the complementary case could be cited as an example of how the mentor had used the material to reflect and share about his personal leadership experiences, thereby orienting the conversation toward being a leader in the host organization, without the use of generative or probing questions.

In addition, Mentee 7 found it difficult to identify talks that were of interest to him based upon the episode titles alone. Many participants did not recall that summaries of the topics covered in each audio segment had been provided to them. To facilitate the selection of relevant topics, a custom Web page that provides participants with audio summaries, alongside links to each audio segment, could be developed for the CLM. Aligned with Mentor 10’s suggestion to provide question prompts and ideas for how to begin discussing audio segments, an audio discussion guide could be developed for the CLM. This guide could also be used to orient both mentors and mentees on the approaches that those who have benefitted from the CLM have used.

9.6.5. Portfolio review at regular intervals

One data collection method found to have potential for inclusion in the CLM, as a support for mentoring, is the portfolio review. During the CLM portfolio review, mentors and mentees were interviewed individually about the Knowledge Forum notes they found most significant. Although the portfolio review was designed to collect data on what mentors and mentees found significant in their discussions, the review was perceived by mentors and mentees as helpful in gaining perspective on the progress of their mentoring experiences, especially with respect to the evolution of the discussion; the development of the mentoring relationship; and the consolidation of insights gained through participation in the program. Portfolios have been used within education to provide for reflective practice, and these have also been used within the context of
professional development (Klenowski, Askew, & Carnell, 2007; Knapper & Wright, 2001). This practice can be carried out at regular intervals, to provide feedback on the mentoring’s progress, as well as at the conclusion of mentors’ and mentees’ participation, as a summative evaluation of their experiences. Further study on the portfolio review process for mentoring purposes is recommended based upon the findings of this study. This finding is a good illustration of how design-based research contributes to learning innovation. The portfolio review was supposed to serve a research function, but it proved equally or even more useful when serving a program implementation function.

9.7. Future Directions for the CLM’s Design

A premise upon which the CLM is based is that volunteer leaders and members will voluntarily participate in a mentoring program for Catholic volunteer leadership. The program’s conception and design were informed by literature on mentoring programs developed for other contexts, such as corporations or educational settings. The incentives for participation and commitment that normally exist in these other settings do not exist within a voluntary nonprofit organization. The CLM is viable only when volunteer mentors and mentees believe that their participation can be of personal benefit, in a form different from remuneration or the grading of performance, such as its being able to afford rewarding social contact (Pearce, 1993) or spiritual growth.

Among the mentoring pairs who participated in the CLM, two of the original mentor-mentee matches sustained their participation over the entire course of the CLM, which ran six months, notwithstanding periods of inactivity. Those parties most committed to the CLM were those seeking answers to their own leadership questions and those who had the time to participate in it. While still participating in the program, Mentee 8, who said “yes” to leadership responsibilities, eventually found himself with less time to devote to the CLM. He conceded that the “busy” stage of leadership, referred to in the audio material, had begun. If the increased responsibility associated with accepting leadership roles becomes an obstacle to CLM participation, then this responsibility can be seen as both a constraint and a goal for the program. Therefore, one must decide how a volunteer leadership mentoring program can accommodate the
increasing responsibilities of mentees. Perhaps, mentees can be promoted to more advanced or time-compatible leadership development programs. One solution to accommodating the increasing responsibilities of mentees would be to extend the CLM over a longer period of time, with mentors and mentees contacting each other on an as-needed basis. In this case, greater opportunities for synchronous conversations and ad-hoc support may be needed and may warrant the use of different communications media.

9.8. Conclusion for CLM Design Considerations

The design of the CLM embedded a priori theory, mostly from literature developed in corporate and educational settings. The findings of this study allow for the CLM to be redesigned, keeping in mind issues that emerged within its voluntary organizational setting; specifically, this would be that of a Catholic religious nongovernmental organization. This initial investigation, therefore, laid the groundwork for future research to explore issues emerging from this study. This potential will be discussed in the upcoming chapter.
Chapter 10.

Discussion

10.1. Overview

One of the challenges faced by voluntary organizations has been developing volunteers’ sense of accountability and commitment to the organization, itself, rather than for the causes it serves. This study was designed with LMX as an influence because of this theory’s strength in describing the association between high-quality, leader-follower relationships and increased accountability to a particular organization (Graen & Uhl-Bien, 1995; Northouse, 2007). This theory was then coupled to other literature, which revealed the potential for mentoring research to provide insights on how such relationships might be developed and how these might contribute to leadership capacity (Groves, 2007; Hezlett & Gibson, 2007; Scott, 2010). Given this perspective, the overarching goal of this study was to identify salient issues that could further scholarly understanding of the interrelationships among mentoring actions, expectations, mentoring relationships, and leadership development within a volunteer leadership context.

These issues and their implications for leader and leadership development will be the focus of this chapter. In addition, considerations for future studies will also be discussed. Specifically, this chapter discusses

- the negotiation and role of relationships;
- the contribution of virtual mentoring as a tool for leader development;
- implementation considerations;
- the study’s limitations and constraints; and
- perspectives on future research.
10.2. The Negotiation and Role of Relationships

10.2.1. Complementary and high-quality relationships

In this study, complementary relationships arose when an alignment existed among the expectations of the mentor and mentee, their experiences with each other, and their experiences with the mentoring environment. This study revealed that most complementary relationships were developed through contributions to discussion made by both the mentor and the mentee. Moreover, those discussions in which both the mentor and mentee learned something about their faith and leadership, primarily through reflection and the sharing of insights, flowed more smoothly than others. Complementary relationships were also able to overcome obstacles to the continuance of the relationship. This can be attributed to the mentor and mentee's negotiation of a communication plan for how to proceed with discussions. The negotiation and implementation of the communication plans were quick. These steps seemed to manage and meet the respective expectations of the mentor and mentee, such that even communication lags did not appear to affect the pair's relationship adversely.

These findings indicate that some CLM mentors and mentees, under circumstances that have now been revealed, seemed to derive satisfaction from the mentoring process and to have developed relationships that worked well within this mentoring environment. However, because few mentor and mentee pairs completed the questionnaires, the extent to which these relationships were perceived to be of higher quality, with regard to LMX measures, cannot be ascertained. Future studies could be developed to see whether LMX constructs that indicate the existence of high-quality relationships do indeed correspond to the complementary mentoring relationships observed in the CLM. A visual examination of the submitted post-questionnaires does suggest that the instrument used, and potentially the constructs on which it had been based, cannot be assumed to measure complementary relationships in that two mentors and one mentee selected “Don’t Know” in response to some of the LMX statements (see Appendix F). Another mentor did not respond to any of the LMX measures, even though he completed the rest of the questionnaire. Future studies could specifically address questions regarding the relationship between high-quality LMX relationships and
complementary mentoring relationships. These studies can further investigate the relationship between these kinds of relationships and the development of leader and leadership capacity.

10.2.2. Relationship versus task orientation

One particularly interesting finding involves how relationships were perceived by mentors. While CLM mentors all believed in the importance of relationships, they expressed a range of beliefs regarding the ability of the CLM to afford relationship building. Some felt that building a relationship was nearly impossible in this context; others felt no difference between online and face-to-face relationship building.

Mentors using a coaching approach believed themselves to be relationship-oriented, but they did little to nurture relationship within the context of the CLM. They explained that this was because they believed it difficult to develop the relationships they needed in order to mentor appropriately. Conversely, mentors whose relationships were complementary took a contributory approach to mentoring, which could also be described as task-oriented. For instance, these mentors and mentees delved quickly into the task at hand. Yet, in contributing to the task, these mentors and mentees were seen building relationship through the task. Those mentors who used a facilitative approach to mentoring were found to have challenging relationships, but the two cases in which this kind of relationship was observed made it difficult to infer whether the mentors could appropriately be characterized as relationship-oriented or task-oriented. Based on my findings, I believe that future research into the relationship and task orientations of virtual mentors and mentees might reveal situations in which a task orientation might be more conducive to relationship building than would be a relationship orientation.

Given the degree to which leadership theories have been based on the dimensions of task-orientation and relationship-orientation, these findings reveal that such conceptions might not be easily identified in practice. This may be the case given that perceptions about relationship orientation and task orientation may not only differ, but they might even be difficult to recognize when observed in a naturalistic setting as opposed to through self-reports. Thus, future studies could explore what it means to be
relationship- or task-oriented, from the participants’ perspective, and why they self-identify with one orientation or another. Future research could reveal aspects of relationship orientation and task orientation that require further clarification or perhaps even reconceptualization.

Perhaps identifying the mentors’ orientations was difficult because of differences in the context in which these leadership orientations had been conceptualized. The leader-mentor’s role and task, especially as it was structured within the CLM virtual mentoring environment, is clearly different from the work group tasks in which these concepts had originated. Within a paid situation, the difference between a task orientation and a relationship orientation might be more clearly observed, since the task dimensions might be more clearly defined and relationship building need not necessarily be related to the work at hand. In addition, it could be said that a relationship orientation and task orientation might be confounded within this virtual mentoring environment, given that mentoring could be conceived as both a task and as a means for building relationship.

10.2.3. Espoused theories and theories-in-practice

After determining whether mentors identify themselves as relationship- or task-oriented, it might also be useful to investigate the degree to which mentors’ espoused theories coincide with their theories-in-use. Argyris and Schön (1974; 1996) proposed that theories of action, which are comprised of a system of values governing how an organization or an individual perceives and addresses situations faced, can be divided into those that are espoused and those that are actually used in practice. Within the context of the CLM, studies could investigate the degree to which mentors’ espoused theories about relationship building are reflected in their actions. This investigation could reveal actual theories-in-use that differ from espoused theories, and mentors could use this as a means for their own personal development. The findings of such investigations might also serve to assist in identifying mentors whose theories-in-use are most suited to the design of a virtual mentoring program such as the CLM.
10.3. The Contribution of Virtual Mentoring as a Tool for Leader Development

10.3.1. Leader or leadership development?

When designing a leadership mentoring program, the extent to which the role of the mentor should focus on the development of leadership capacity (organizational) or the development of a leader (personal) must be determined. This decision requires greater understanding of the relationship between leadership development and leader development. This study’s findings reveal promise in the continued exploration of how virtual mentoring contributes to the development of leadership, especially in relation to leader identity. Specifically, more in-depth investigation on how a particular mentoring approach contributes to conceptions that mentees hold about themselves as organizational leaders is required.

From this study, we see that mentoring was perceived by mentees as contributing to their understanding of Catholic leadership, which is related to leader development. However, how leader development influences leadership development is unclear. While this study was designed to explore whether the CLM resulted in a greater willingness among mentees to take on leadership opportunities, thereby increasing the leadership capacity of the organization, my findings on this issue remain inconclusive.

These findings, however, are positive in that those mentees who completed the program believed that they had learned about leadership and that they had gained an understanding of how to apply it within their lives. I also observed that some mentees (through the CLM in combination with the organization’s existing leadership development program) did accept opportunities to serve as leaders. Mentee 8’s experience is an example of how one participant accepted leadership roles, including that of coordinating events, because his mentor had advised him to say “yes” to opportunities that came his way.

Although these findings suggest that mentees believed they understood more about leadership and how it could be applied in their lives, these findings do not indicate a definite relationship between mentoring and an increase in one’s willingness to serve
as an organizational leader. The seven mentees who participated in the CLM provided rich and in-depth data on how high-quality relationships, as perceived within this environment, can be developed. However, too few mentees participated to infer a clear relationship between CLM participation and willingness to accept leadership responsibilities. Moreover, only three questionnaires were returned, making pre- and post-implementation comparisons inappropriate.

The dynamics between leader development and leadership development require further exploration in order to determine whether and how such a dynamic can be facilitated by a virtual mentoring program. While this study provides an impetus for the continued investigation of how a mentee becomes a leader, by participating in a CLM mentoring relationship, I believe it useful to clarify specific areas of investigation. In terms of leader and leadership development, future research questions include the following:

- Does leader development contribute to leadership development, within the context of an asynchronous, virtual mentoring program?
- Does leader development contribute to a willingness to lead or serve in the organization?
- To what degree does this willingness to lead increase commitment to this organization over other organizations?
- Toward what level of leadership should mentoring programs, such as this one, be directed to contribute more effectively to leadership development?

10.3.2. The construction of leadership identity

From a relational perspective (see Literature Review: Part I), leadership emerges from the negotiation of and participation in the processes and outcomes by which it is ultimately defined. As such, leadership is not defined by a particular role in which a person (leader) has a social influence on a follower to complete a task. Instead, the definition of this role (the role of the leader) emerges from leadership (the distributed relationships among the people, processes, and outcomes by which leadership, itself, emerges or becomes organized). In this sense, both leaders and followers participate in leadership, but their relationship to one another does not define leadership. Rather, leaders and followers become but two participants in a particular system of leadership. If
this is the case, another area of exploration that may be useful for leadership development involves research into the construction of a volunteer leader’s identity and role.

Related issues include determining whether willingness to lead should be based upon the acceptance of the formal leadership title, commitment to the formal leadership role, participation in leadership activities, or leadership identity development. To illustrate this issue, consider Mentee 8’s experience. Mentee 8 is formally a new leader within the organization; therefore, he has already accepted a formal leadership title. However, it was not known to what degree Mentee 8 was committed to this leadership position, at the beginning of the CLM. The organization has been known to have formal leaders who have never attended to their duties or attended meetings, as revealed in interviews with its current leadership. With respect to participation, Mentee 8 became increasingly involved with leadership activities, to the point that he became too busy with these and could no longer participate in the CLM. Further, he attributed his increased participation to Mentor 8’s suggestion to “say yes” to leadership opportunities. If we use a relational perspective of leadership for the CLM, one could say that Mentee 8’s increased participation in leadership activities provides evidence that the CLM had contributed to leadership development efforts. With respect to leadership identity, Mentee 8 still did not consider himself to be a leader, by the end of the CLM, but he stated that his conceptualization of leadership had shifted to one more aligned with Catholic leadership.

The emergence of this situation has implications for future study. If one uses commitment to leadership as an indicator of willingness to lead, then one would have to identify what this commitment involves and how this can be measured. If one were to take a relational perspective, with greater participation in leadership activities as the aim of the program, the impact of the program could be more easily linked to leadership development efforts, because increased participation is likely to be more easily defined and observed than is commitment (Drath & Palus, 1994). This line of research could also link the CLM to efforts that build a community of leadership practice for a host organization. This line of research would also complement the investigation of how leaders’ identities develop as they interact with mentors, acting as role models of Catholic volunteer leaders, within that organization. Further, given that the organization
trains its leaders on its view of leadership, how the leader adopts the leadership values and norms of the larger community of organizational leaders can be studied. I discuss a situated learning perspective for future iterations of the CLM later in this chapter.

10.4. Implementation Considerations

Chapter 9 identified design considerations for future implementations of the CLM. Here, I extend those considerations by discussing them within the context of related literature in the field as well as contextualizing the micro-level program design considerations, from Chapter 9, within the meso-level of the organization. The issues to be discussed are

- organizational integration;
- designing for coaching, sharing, or facilitation; and
- the potential for social media integration.

10.4.1. Organizational Integration

Day (2001) suggests that initiatives for increasing the social capital for leading an organization must be comprehensive and have organizational support to be effective; therefore, it is best for those considering the implementation of a virtual mentoring program not to consider it as a stand-alone initiative. Based on the implementation of this program, one must consider the role a mentoring program plays within an organization. Issues to consider include its target group (potential or new leaders); its duration; and its integration into the organization’s culture.

Virtual mentoring was perceived by mentors and mentees as complementing other leadership initiatives within the organization’s existing leadership development program. It did so by affording mentees a greater understanding of Catholic leadership, but it also gave mentees insights into how to apply this understanding within their own lives and, according to some participants, at a depth of reflection greater than or complementary to what they had experienced within the organization’s overall program. However, benefits that accrued to mentees were related to situations they found relevant to their personal lives, which did not necessarily include situations directly relevant to
leadership within the organization, as was the case with Mentees 6 and 7. One must, therefore, consider to what extent such a program should be a forum for discussing issues that are not directly related to leadership within the host organization. This implies that further thought be given to mentee selection, especially since potential leaders will likely have less direct leadership experience within the organization.

Although the CLM was aimed at potential and new leaders, the CLM was viewed, by some, as being suitably targeted toward established or executive leaders. Offering the leadership first-hand participation as mentees may provide them with similar benefits to the ones experienced by potential and new leaders. Moreover, their experience as participants could help them to understand what attitudes are necessary for those participating in it as mentors. In this way, they might be able to identify criteria for mentee selection that did not emerge in interviews with this implementation’s mentors and mentees.

Another issue that emerged, during the implementation, involves decisions about how long mentors and mentees should participate in the CLM. Based upon findings from the requirements-gathering study, I designed the CLM to be six months in duration. Three months had been found too short because of the length of time it took to begin discussions and lags in communication. Given the findings of this study, six months appears to have provided adequate time for meaningful relationships to develop. However, it was not long enough to generate as much discussion as mentors and mentees would have liked, especially when re-matching was required.

More importantly, one must clarify CLM goals to determine whether mentees should continue to participate in the program after they have committed to leadership responsibilities and become busy trying to fulfill these duties. A critical question to answer would be: does one consider the mentoring as being completed upon a mentee’s decision to commit to a leadership position, prior to the end of the program’s timeframe? From a leadership development standpoint, as previously discussed, the increase in leadership capacity within the organization, through the mentee’s commitment, would indicate that the CLM had accomplished what it had been designed to do for that mentee. Alternatively, it is possible that the CLM could become even more relevant to
mentees once they begin actively serving, because they would be able to discuss situations faced by organizational leaders with their respective mentors. However, if the program’s goal is to provide mentoring only to the point at which the mentees actively serve in a leadership role, then existing organizational support structures must be in place to provide the newly active leader post-CLM guidance. This requires better integration between the CLM and the organization. During this study’s implementation, one might have found greater coordination, between the CLM and the leadership, and greater accountability, for the CLM from its participants, had it been an in-house program rather than a research study. Nonetheless, the issues uncovered through its implementation can provide program coordinators (as well as future researchers) with suggestions on designing and implementing such a program.

While I have already discussed issues related to decisions about willingness to commit as a program goal (See The Construction of Leadership Identity), I had done so with respect to its theoretical implications and use in future research. However, practical reasons having to do with organizational integration may ultimately determine how such a goal will be conceptualized. Specifically, one must determine whether the mentoring program more appropriately contributes to an increase in leadership capacity when this increase is defined as a mentee’s committing to active service in a leadership role (after understanding what being a leader entails) or in terms of that mentee’s continued willingness to participate in leadership activities (regardless of holding a formal appointment or not). One of the goals for this study involved clarifying the expected outcomes (Sandoval, 2014) of the CLM. To this end, a more developed understanding of the differentiated outcomes an organization might have for the CLM has been outlined. Given that the CLM is intended to be one of the tools that an organization has at its disposal within its own leadership development and succession system, the outcomes the organization selects for the CLM require determining how it can best contribute to that particular organization’s needs.

**Increasing participation**

Virtual mentoring programs for voluntary organizations, in which less expectation exists for regular participation, require that greater emphasis be placed on encouraging participants to communicate regularly. However, doing so will not reduce competing
demands on the mentor’s and mentee’s attention. While formal program structures, such as providing a communication timetable, can increase participants’ accountability for engaging in discussion, the voluntary nature of the program may still lead to irregular communication. More likely, incentives must be developed with volunteers in mind. Unlike the remuneration given to paid workers, these incentives may involve providing mentors with normative power (Pearce, 1993), such as providing recognition to those who have participated in the mentoring program in ways consistent with the values of the organization. Better integration with the organization’s leadership development program and developing appropriate incentives may provide motivation to participate more regularly, especially if mentors and mentees can be held, in some way, accountable to the organization for their participation in the program. However, it is not yet clear what kinds of structures and incentives would afford greater and more consistent participation in asynchronous mentoring environments for volunteer leadership.

10.4.2. Designing for coaching, sharing, or facilitation?

Even though the host organization’s leaders participate in a structured leadership development program, they received no formal mentoring training. Therefore, it is unsurprising that mentors held different conceptions and approaches to mentoring, despite sharing the same organizational culture. Indeed, one observes what the mentoring literature has highlighted, which is that mentoring is a broad and not clearly defined concept (Jacobi, 1991).

Three broad views about mentoring were found in the data; these included a coaching approach, a facilitative approach, and a sharing approach. In recognition that CLM participants hold various conceptions about mentoring, those who wish to implement such a program must consider these approaches during program design, recruitment, and training. The success of CLM relationships pivoted on the degree to which mentors believed they needed to know mentees, prior to providing them guidance, and on the degree of control that mentors believed they had in guiding a mentee into leadership. These two issues were related to the mentoring approach selected by CLM mentors.
Coaching

The study revealed perceptions and attitudes about mentoring, relationships, and technology that had not been apparent prior to its implementation. The relationship between mentoring and coaching, for instance, was a dominant theme in two cases. While distinctions have been drawn between mentoring and coaching, the two concepts do have similarities (D'Abate et al., 2003). Moreover, coaching can be viewed as one of the instrumental functions of being a mentor (Bierema & Hill, 2005; Kram & Isabella, 1985). However, in general, coaching implies a more specific action, which aims to guide to a particular end that is often tied to performance (D'Abate et al., 2003). Within the context of this study, coaching was not found to be compatible with the CLM’s asynchronous, virtual mentoring environment. Future research could explore whether this incompatibility can be isolated to this particular implementation.

Given the context of this study, however, relationships in which the mentor focused on coaching did not fare well. While preliminary reasons for this mismatch have been explored and relate to the lack of contextual and relational cues about a mentee’s performance, these findings require that decisions about whether coaching should play a role, within such a mentoring environment, must be made. Therefore, one must consider whether coaching is a necessary mentoring function for CLM goals or whether it can be offered through other initiatives for leadership development in the organization.

From an innovation standpoint, one could ask how a virtual mentoring program could be designed to support the coaching function more effectively. Although this issue lies outside the scope of the present study, the redesign of the CLM, toward the support of this function, might prove valuable if the CLM mentors are directly responsible for their mentees’ leadership and co-located, rather than located at a distance. One possible innovation could be a coaching tool, designed to assist current leaders or mentors. A coaching environment employing simulations or games (Gee, 2005) for leadership might be one means by which those employing a coaching-focused approach to mentoring could more fully participate. The integration of goal-based scenarios (Schank, Fano, Bell, & Jona, 1994) into a mentoring program may be another design worth considering. Coaching functions may be better suited to online games, simulations, or scenarios in
which mentees’ decision making can be observed and tracked in context, thereby enabling coaches to make suggestions for performance improvement.

**Sharing**

A sharing-focused conception of mentoring was found to be the best fit for the affordances and goals of the CLM, and it provided benefits to both the mentor and the mentee. This finding is aligned with existing research, which suggests that mentoring relationships are more satisfying for mentees when their mentors share personal insights that stem from their experience and knowledge (Bierema & Merriam, 2002). This study provides evidence that the sharing of these insights and experiences, between a mentor and a mentee, facilitates more meaningful CLM experiences than other mentoring interactions.

This study’s findings about sharing also align with research on the development of reflective practice. Reflective practice refers to the action of attending to the underlying theories that one uses in practice to inform decisions and guide behaviour (Bolton, 2010). Argyris and Schön (1974, 1978) have been influential in the conceptual development of reflective practice, which has in turn influenced thinking within professional development and organizational learning. Mentees in the CLM found that reflecting upon attitudes and beliefs, associated with being a Catholic leader, provided them with insights into values espoused by the organization. Mentees also reflected upon how their mentors applied these particular values to their lives. To the extent that mentoring took place, mentors shared insights on how they interpreted espoused values and shared stories about the consequences of acting in alignment with these values. It was in the context of reflective practice that mentors and mentees appeared to find sharing meaningful.

One method that may lead to innovation, within the context of reflective practice, is the portfolio review, in which a mentor or a mentee individually reviewed, selected, and discussed those aspects of the online discussion that was found to be significant. These interviews can help mentors and mentees frame their CLM experiences and assist them in summarizing their learning. In addition, portfolio reviews provide mentors...
and mentees with opportunities to identify ways in which their mentoring discussions can be improved.

Within education and professional development, portfolios have been used as assessment and learning tools (Knapper & Wright, 2001). Further development of the CLM’s portfolio review could be informed by models for guiding reflection, such as the four lenses suggested by Brookfield (1998) for viewing one’s practice. He recommended using one’s personal experience as a means for learning; seeing oneself through the eyes of learners or, within the CLM context, one’s mentor or mentee; reflecting upon the experiences of colleagues or peers; and reflecting upon the theoretical literature, such as the theory about Catholic leadership espoused by Spitzer (2000, 2004).

In addition, Bolton (2010), based on her past experience and research, asserts that the goal of reflective writing is not to produce a final product, such as an essay, but rather to gain insight into situations faced and decisions made by practitioners. Bolton explains how stories become a means for understanding one’s decisions and actions, which can then be shared with others through discussion forums. Within the context of the CLM, the principal mode for sharing is writing, which has been advocated as a means for developing reflective practice (Bolton, 2010). This is the kind of writing described by mentors and mentees when they shared ideas, stories, and insights in the CLM.

My findings support the use of reflective writing and storytelling, within the virtual mentoring environment, as means for developing greater reflection on leadership for both mentors and mentees. Further, these findings reveal the potential for continued exploration of how mentors use reflective writing to convey understanding and how mentees use it to gain new perspectives about leadership. This avenue for future research can offer new perspectives on how to improve mentoring discussions within virtual environments. Furthermore, the extent to which new leaders use the tools of reflective practice, outside of the mentoring environment, has potential for extending literature on organizational learning. Future studies can explore these issues while using the present study to inform their design.
One reason for the sharing approach’s effectiveness is that mentees found it useful for gaining a practical understanding of how to handle the challenging aspects of leadership. Mentors and mentees appreciated the use of self-disclosure when they exchanged stories about challenges. Wanberg, Welsh, and Kammeyer-Mueller (2007), who quantitatively investigated self-disclosure and mentee satisfaction with the mentoring relationship, found that mentees’ self-disclosure was more important than that of mentors’ self disclosure in influencing mentee satisfaction. They also found that mentees tended to disclose more about themselves than had mentors. Although conducted within a voluntary organization, this present study may offer some perspective on Wanberg et al.’s findings. For instance, Mentee 7 expressed satisfaction with the mentoring relationship because it afforded the learning of new insights and his mentor provided him with a “sounding board” for his ideas and experiences (Devins & Gold, 2000). Thus, Mentee 7’s experience supports Wanberg et al.’s finding that mentee self-disclosure contributes to relationship satisfaction.

However, other CLM findings reveal the complexity of the relationship between mentor and mentee self-disclosure with mentee satisfaction. Within the CLM, a re-matched Mentee 9 was found to be more satisfied with the re-matched relationship, wherein his mentor self-disclosed about personal issues more than his previous one. It is possible that this self-disclosure, which often arose when the pair began coordinating their activities through text messaging, had contributed to a sense of understanding and rapport during mentoring sessions. Self-disclosure may then have left the mentee feeling that this second mentor was more engaged in the mentoring experience. This study and those similar to it can provide insights complementary to findings from descriptive, quantitative studies, such as that conducted by Wanberg et al. (2007), and offer new perspectives on mentor and mentee self-disclosure.

The sharing of experience, the major element in a contributory approach to mentoring, was perceived as building goodwill and trust as well as allowing for flexibility in mentoring goals. On the other hand, the sharing of experience does not necessarily lead to insights relevant to leading within the host organization. Therefore, similar to the need to decide whether the CLM should focus on leading in general or leading within the organization, one must consider whether the program should emphasize the
organization’s or the mentees’ goals. Consideration must be given to how sharing can be used to guide the discussion toward organizational leadership.

An issue that must also be considered is whether the aim of the CLM should be inducting mentees into leadership within the host community or inducting them toward leadership in contexts and situations that are of interest to the mentee. Although not an explicit focus of the present study, the ethical tensions of balancing organizational and individual interests must be considered at the design phase. Given that mentoring is often conceived as a way to support individuals’ socialization into the ways of thinking and being of a particular profession or community (Bierema & Merriam, 2002; Hezlett & Gibson, 2007; Mueller, 2004; O’Neill, 2001), ethical issues surrounding the aim of the mentoring program inevitably arise. Practitioners considering the design and implementation of such a program must consider its aims and the degree to which potential or new leaders have input in the direction that mentoring takes. Given that program goals are directed toward developing leadership capacity, one must consider designs that allow for flexibility in the direction of mentoring, but that also afford reflection upon issues directly relevant to the organization.

Facilitation

Facilitation is considered important for learning in educational settings (Wise & O’Neill, 2009; Rovai, 2007). Within that context, the focus is on structuring discussions so that learners develop deeper insights or shared understandings. The role of instructors as the conveyors of knowledge is exchanged for one wherein they guide learners’ construction of knowledge through experience and discussion. Within this scenario, the instructor ensures that the discussion remains focused on student-to-student interaction. The instructor’s voice is minimized. Facilitation uses generative questions to open discussion and probing questions to gain a deeper understanding of student thinking. These techniques are often employed within a group setting so that multiple perspectives on a topic can be shared.

Within the CLM, however, facilitation techniques were used by two mentors with mixed results. In sum, this approach was difficult to implement within the context of an asynchronous, virtual environment for volunteer leadership mentoring. In particular,
mentors stated that the environment did not effectively support the use of generative or probing questions. As observed in the findings and design considerations, using facilitation techniques in the CLM becomes problematic because of the existence of time delays. Mentees may not respond to their mentors’ probing questions or may start discussing new topics, after significant time lapses between the posting of notes. Time lags can make probing questions ineffective in deepening conversation toward particular ends.

This issue may be compounded if the mentee views the mentor as playing the role of merely a resource provider (O’Neill & Harris, 2004), rather than as a partner with whom ideas and practices are explored. This may lead mentees to disclose only those aspects about themselves or a situation that they believe relevant in obtaining the understanding they need. Doing so, however, may lead mentors to become uncertain about the strategies they are using to support their mentees. However, modifications to program design or training could be developed to reduce turnaround time for note postings and to encourage self-disclosure, thereby mitigating these problems.

Given that facilitation assumes a particular goal for the discussion, it can lead to greater focus on achieving the organizational goals for a mentoring program. Since the goals of the CLM are to direct attention back to the organization and a leader’s role within it, finding a way to help mentors know how and when best to use facilitation techniques is desirable from an organizational standpoint. From a design perspective, one might consider designs that afford the use of both sharing and facilitative approaches. If one were to train CLM mentors to use the sharing of experiences as a way of modelling the kind of discussion that works effectively, it may be possible to facilitate the conversation toward organizational leadership experiences while also accommodating issues of personal relevance to mentees, which go beyond those of the organization.

**DBR and mentoring insights**

I believe these insights about mentoring were facilitated by the use of a design-based research orientation. These findings may not have emerged had these mentors not participated in a virtual mentoring environment that afforded particular kinds of
mentoring interactions. Some of these affordances were designed into the virtual mentoring program, but others were not known beforehand. Mentors, in particular, brought with them beliefs about mentoring that they had constructed through interactions with others. The CLM was found to support reflection, as designed, but I later found that a contributory, sharing orientation was most compatible with its design. Participants were found to reject the mentoring environment or to question their assumptions about how to mentor, when the environment did not afford a particular type of mentoring interaction as well as participants expected, such as with guidance-oriented approaches. The fact that these findings emerged supports the continued use of design-based research as a means for gaining greater insight into the assumptions people have about mentoring. It is also a means by which various innovations can be designed to afford different kinds of mentoring interactions that, in turn, assist participants in constructing more complex understandings about mentoring, itself.

10.4.3. The potential for social media integration

Without the use of social media or mobile technology, I find it difficult to see this program as having had success because of the vital coordinating functions these technologies played. Those who consistently employed the technologies to help them coordinate the CLM task not only had sustained participation in the program, but they also seemed to have better experiences relating to each other. However, should social media be used solely as a coordinating and supporting communication mechanism, or should it be used as the principal platform for the program? As discussed in Chapter 9: Considerations for the Future Design and Implementation of the CLM, one must consider whether the current forms of social media, especially when accessed using mobile technology, can provide for rewarding asynchronous mentoring experiences. Would the use of tools developed for lightweight social interaction and communication provide too many distractions from the kinds of reflection found beneficial to mentees and mentors who completed the CLM? What kind of design could be developed that could make use of the affordances of social media?

One kind of mentoring for which social media could afford appropriate support is group mentoring. Within group mentoring, an experienced mentor shares advice with
several less experienced mentees (Knouse, 2001; Kram & Hall, 1996; McCauley, 2005). This kind of mentoring may be enhanced by the affordances of social media (Hurt, Moss, Larson, Lovelace, & Prevost, 2012), such as ease of access to other group members; efficiency in communication; and the potential to provide more background information on group members. Moreover, a mentor working with a group may be able to grasp cues signalling how mentees interrelate with one another, which may provide the context desired by those employing a coaching approach. Group members may discuss issues of relevance to the whole group, such as situations that they are currently facing in their leadership (Knouse, 2001; Kram & Hall 1996). Furthermore, facilitation in groups may be easier because various mentees can contribute to the discussion within a given time span, providing for more opportunities to probe and obtain multiple perspectives on the topic being discussed.

10.5. Limitations and Constraints

This study's findings have contributed to the literature on virtual mentoring for volunteer leadership development. The experiences of seven mentor-mentee pairs were explored in depth to provide for naturalistic generalization (Stake 1995), thereby enabling readers to compare their own mentoring experiences and relationships with the cases presented in this study. Detailed descriptions of the implementation and methodology, as well as the rich accounts for which the cases provided, give readers the opportunity to assess the quality of this study's findings. Given the rich data collected, I was able to obtain insights critical to the continued exploration of virtual mentoring within this context.

Although not a limitation from the perspective of qualitative research, this study's research approach does present a constraint upon the kinds of inferences that can be made beyond the cases discussed. It is also acknowledged that the implementation of this study has not been without its limitations. First, the number of participants who completed the program left me with only a few cases to examine in detail, though these were nonetheless rich. In addition, a learning curve associated with the implementation of this program existed, because similar research had not previously been conducted within this context. As such, suggestions for designing an optimal virtual mentoring
environment for volunteer leaders were limited, and the CLM design was influenced by literature from other contexts (see Intervention Design). In addition, the resources required to design the program were also limited to what was available. It was not considered feasible to develop a completely new technological environment, so the decision was made to use Knowledge Forum and Audio Re-Searcher. These two platforms required separate logins for participants, which added complexity when navigating between them. Integrating the capabilities of these two systems into one software environment could alleviate some of the participants’ concerns.

In addition, one of the major issues described by participants was not being notified about when it was their turn to post or to read a post. In fact, had this issue been resolved, better quality relationships may have been afforded, especially among those who needed faster turnaround times to facilitate discussion. This notification feature is indeed available in Knowledge Forum, but it was not known to the researcher until after the implementation had been completed. Yet, it is unlikely that the benefits of receiving notifications for new posts would have resolved all communication and time lag issues because many of these issues also arose from the lives of the participants, themselves.

Moreover, the fact that the CLM was a research study (and was presented as such) appeared to provide the mentors with less influence over their mentees than they might have had if the CLM had been better integrated into the organization’s structures. The perceived lack of organizational ownership for the CLM may have influenced how mentors viewed their roles and their commitment to mentees and vice versa. Regarding mentee experiences, the only ones I described were of those who were willing to participate in the mentoring program, because the other mentees did not post or respond to invitations to participate in interviews. As a result, barriers to participation could not be studied.

The research methodology could have been improved had the pre-questionnaires been administered at T1 (two months) instead of at the beginning of the CLM. Mentors and mentees who responded to the questionnaire stated that they did not know the other party well enough to rate perceptions about their relationship. Administering the questionnaire after the first two months would have provided for more
information. In addition, if the incentives or implementation had afforded greater commitment, then more data could have been collected on the development of mentoring relationships. Further, the weekly logs were only regularly completed by two participants, and this was done only until T1 for one and T2 (four months) for the other. Better instrumentation and implementation could have led to the collection of more data, especially with respect to mentoring expectations; juxtaposition of mentor and mentee experiences; identification of turning points within mentoring experiences and relationships; and willingness to accept leadership roles. These data could also have provided for greater triangulation of findings.

Better research participation incentives must be developed. One mentee stated that upon realizing that he was no longer eligible for the incentive, his motivation to participate dwindled. This incentive was that those who submitted weekly logs regularly would be eligible for three $50 draws for each two month cycle, over the six-month period. Over the course of the study, this incentive proved ineffective, as only two participants regularly returned weekly logs during the first cycle. During the second cycle, only one person returned the weekly logs regularly. This means that weekly logs did not provide the data they were designed to collect, which was information on mentors’ and mentees’ perceptions about the mentoring process and relationship over the course of the cycle. As such, their weekly impressions could not be matched, and less data about the nature of that particular mentoring relationship was gathered.

To some extent, access to technology was also an issue. One mentee stated that he could not access the environment. In this instance, attempts to troubleshoot were unsuccessful because the mentee did not return the follow-up messages needed to resolve it. In another case, the mentee could not access the CLM environment via a tablet and did not have access to a computer. Moreover, the platforms, chosen because of their stability and ease of use, were perceived to be “archaic” by at least one mentor and another mentee. These perceptions could also limit motivation to participate among those who are technologically savvy and who expect mentoring environments to reflect the norms they see in current technology products.
10.6. Future studies: Perspectives

As previously mentioned, future studies could focus on improving the mentoring environment and using it to further investigation into personal sharing and reflection among CLM participants. Other research and theoretical lenses might also prove useful in future research, given new insights from this study. The CLM could also be useful in investigating the negotiation of trust within a relational leadership context. One could use a situated perspective to study how mentees become leaders, through their participation, in the CLM. In addition, other research approaches might be more effective in investigating phenomena identified through this study.

10.6.1. A leadership theory perspective beyond LMX

This study, using leader-member exchange theory to inform its framework, proved useful for exploring how mentoring relationships developed within the context of the CLM. Along with LMX, other theories could also be used to guide future research and refine the program and variations of it. Potential theories include contingency theory (Fiedler, 1971; Northouse, 2007) and 3-D management theory (Reddin, 1970).

Contingency theory provides perspective on the situations faced by leaders and a framework for understanding which situations are more compatible with certain kinds of leadership approaches. It assumes that leaders, given their particular leadership approach, will not be effective in all situations. The situation is defined according to the dimensions of power relations; task structure; trust levels; and Least Preferred Co-worker style. Contingency theory can be used as a means for guiding the design of future implementations by virtue of varying task structure for the mentoring pair or power relations between the pair. We would then be able to investigate how a learning environment affords leadership mentoring and the development of mentoring relationships when situational dimensions vary. This may be particularly useful given the differences of opinion that exist with respect to CLM goals and who should participate as a mentor or mentee within the program.

A theory related to contingency theory is Reddin’s 3-D management theory, Reddin’s labelling of an approach as neutral until viewed in context may provide a good
model for building theory about volunteer leadership mentoring within a virtual mentoring program. Reddin identified cases wherein certain approaches were a better fit than in others. In the case where the fit was good, the approach was perceived as a positive one, while a less favourable fit resulted in the same approach being perceived as negative. Thus, Reddin’s theory can be used to inform a framework for future research that does not assume that a mentor’s style is fixed, but that focuses on how well mentors recognize and adapt their approaches to situations they face when mentoring for volunteer leadership.

This lens would shift the focus of research toward understanding the conditions that are favourable to a particular mentoring approach and those that are not. Consequently, another avenue for future research would be to study how particular mentoring approaches are perceived across various types of mentoring environments to identify when they will or will not work effectively. Indeed, a comprehensive research program may, one day, investigate identified approaches across various media and organizations to develop a comprehensive theory on mentoring approaches such as that developed by Reddin for leadership approaches. Moreover, future research could be informed by Reddin’s concept of style flex to provide insights on how successful mentors gauge situations and adjust their styles appropriately.

Both contingency and 3-D theories provide slightly different nuances to the study of leadership that are aligned with design-based research and can inform the design of mentoring tasks. While mentoring and leadership are not one and the same, they are not incompatible constructs, especially when a leader is mentoring a member into a particular community of leaders. Thus, these theories can provide for useful theoretical lenses by which to conduct design-based research on volunteer leadership mentoring environments. In addition, instrumentation could be administered to mentors, prior to the intervention, and used to predict their behaviour in online mentoring situations. The degree to which behaviour is consistent with theory can reveal how compatible these constructs are with mentoring in the online environment. In addition, emergent issues that arise in cumulative studies might contribute to potential refinements in constructs or theory.
10.6.2. Trust and effort in relationships

Trust

Brower et al. (2000) developed a relational theory of leadership by investigating complementary concepts in the LMX and trust literatures. They built their model on both LMX and the interpersonal theory of trust proposed by Mayer et al. (1995), where trust is defined as follows:

[T]he willingness of a party to be vulnerable to the actions of another party based on the expectation that the other will perform a particular action important to the trustor, irrespective of the ability to monitor or control that other party. (p. 712)

In their model of relationship leadership, Brower et al. explained that the conception of reciprocity used in interpersonal trust involves the interactive and iterative testing of the ability, benevolence, and integrity of the other party, whereas reciprocity in LMX is conceived in terms of the exchange of services. Research into trust does not require that the trustor and trustee reciprocate equivalent levels of trust. Thus, in Brower et al.’s model, LMX measures the quality of a relationship, but interpersonal trust theory’s contribution is that the leader and follower need not have the same levels of trust.

This literature could provide for the development of a study, using the DBR orientation of the CLM, for studying how trust is negotiated in volunteer leader mentoring relationships. Indeed, this avenue of research might be quite promising because elements of this model have already been observed within the CLM. Perceptions of trust were not necessarily reciprocal, in terms of both parties involved, when trust was observed. Instead, levels of trust seemed to be in a state of flux in challenging relationships, as observed in Pair 7. While not measured quantitatively, trust appeared to be reciprocal among complementary pairs. Investigations relating to how trust is negotiated among pairs and how the quality of relationships contributes or can be attributed to trust could be conducted within the CLM.

Propensities to relate and trust

The CLM could be used to study an individual’s propensity to relate, which Brower et al. describe as a characteristic of a leader that provides an indication of the
quality of a leader-follower relationship at the start of its development. They encourage researchers to investigate how this propensity to relate develops. Brower et al. (2000) define the “propensity to relate [as] an individual difference variable that exists at some level in all individuals before any exchange occurs. It sets a base rate of trust for the relationship.” (p. 236) They base this construct upon Mayer et al.’s (1995) propensity to trust; Brower et al. (2000) state,

Our view of propensity is based on Mayer et al. (1995) who consider personality as one of the antecedents of propensity, but also add that culture and experiences also influence an individual’s propensity to trust. This makes our conceptualization of propensity to trust more dynamic than that of a disposition or personality trait alone because it can change with new experiences. (p. 236)

According to Brower et al., propensity to trust corresponds to LMX in that some leaders are theorized as being predisposed to developing relationships. They theorize that the propensity to trust a particular new subordinate will differ from an individual’s general propensity to trust. Therefore, Brower et al. proposed that, through the construct of the propensity to relate, a link between propensity to trust and LMX could be made.

Within the context of the CLM, interviews with mentors and mentees could inform the development and refinement of these two constructs. For instance, how willing mentors were to share their personal experiences with mentees was based upon their conceptions of mentoring and their perceptions of the trust level within their relationships. In addition, some mentors appeared to have a higher propensity to relate to and share with members. For instance, Mentor 8 believed it necessary to place himself in a vulnerable situation first in order to begin developing the mentoring relationship. On the other hand, Mentor 5 never felt that he knew his mentee well enough to begin relating to him. Indeed, Mentor 5 stated that they had never met, despite having videoconferenced during the orientation session. For him, relating and potentially trusting are dependent on the context of the relationship. Furthermore, these differences were observed in an organizational culture that promotes the development of relationships.

A greater similarity in the propensities to trust and relate among participants could conceivably be developed with appropriate organizational structures, support, and
training. However, doing so would require research into how these propensities relate to mentors’ perspectives on mentoring and relationships. The CLM can provide an opportunity to explore mentor’s experiences with trust qualitatively, thereby providing insights that could inform the conceptualization of these propensities.

**Trust, benevolence, integrity, and effort in relationships**

In addition, the CLM might be used to examine benevolence and integrity. Brower et al. (2000) define benevolence as “the degree to which the trustee, aside from an egoistic motive, wants to benefit the trustor.” (p. 236) Brower et al. (2000) then define integrity as “the degree to which the trustor’s actions reflect values acceptable to the trustee—for example, consistency and predictability.” (p.236) These constructs are viewed as antecedents to the development of trust and quality relationships. Mentors 7 and 8 were both observed as being generally benevolent toward their mentees, or trustors. They also displayed integrity, as observed in their mentees’ (as trustees) descriptions of them. In fact, despite Mentor 7’s concerns about his mentoring relationship, Mentee 7’s description of their relationship could be characterized as trusting. Future studies could be designed to investigate these relationships in greater depth.

Furthermore, the CLM could also provide an avenue for investigating perceptions about the relative effort that each member of the dyad expends on relationship building and how these perceptions are manifested in relationship. Maslyn and Uhl-Bien (2001), in their empirical study of 232 dyads, found that the relative effort of one’s partner drove the development of the relationship. Maslyn and Uhl-Bien found that when one perceived oneself as expending too much effort on a relationship relative to one’s partner, one became disappointed and lost respect for the other.

Within the context of the CLM, mentors using a contributory approach (these being Mentor 8, Mentor 9, and Mentor 10) were perceived by mentees as having taken initiative and as caring for the relationship. Mentor 7 was, likewise, viewed positively by his mentee, though he viewed himself as investing more effort in the relationship. In all these cases, mentors expended effort to communicate and build relationships with their mentees. Furthermore, these mentors were perceived positively even when significant
amounts of time had elapsed between communications. Research could be designed to explore how each party comes to define the other’s efforts in order to identify factors that contribute to perceptions of relative effort. Furthermore, investigations could examine how mentors and mentees negotiate and maintain their relationships when their expectations about relative effort are not met.

**Propensity to trust, intention to trust, and the situation strength**

Gill et al. (2005) conducted a study investigating how the strength of a situation (strong or weak) moderates the relationship between propensity to trust and intention to trust. A strong situation is one in which behavioural cues are obvious and lead to similar interpretations of the situation and little variety in expectations on how to respond to these cues. A weak situation is one in which these cues are highly ambiguous, allowing for a wide variety of behavioural responses because different ways exist to interpret and respond to the situation. Gill et al. provided university students with scenarios of a situation in which they were to imagine themselves working with a coworker on a project. Participants were randomly assigned to groups in a between-subjects design. They were given scenarios that were modified for each group according to the situation strength and the coworker’s ability, benevolence, and integrity. Measures of propensity to trust, intention to trust, and ratings of ability; benevolence; and integrity were obtained.

Gill et al. found that situational strength moderated the relation between propensity to trust and intention to trust, meaning that the correlation between propensity to trust and intention to trust was significantly higher in weak situations than strong situations. It is theorized that strong situations provide for salient social cues that require a particularly appropriate or socially acceptable response. If one knows that a coworker has high ability; displays benevolence toward others; and has high integrity, then the appropriate response is likely to be that one should trust the coworker. It is probable that even a person who scores lower on propensity to trust will still trust this coworker. However, when situations are ambiguous, propensity to trust is likely to play a more important role in one’s intention to trust a coworker.

These findings can provide insights on the degree to which some mentors and mentees were willing to trust each other within the mentoring environment. The CLM
could be characterized as a weak situation. The mentor and mentee do not necessarily have a clear idea of the ability, benevolence, or integrity of the other person, even though a coordinator might stress that only qualified candidates were selected for the program. For instance, Mentee 7 did not originally trust that his mentor had the requisite knowledge necessary to mentor him. He preferred to be mentored directly by Spitzer. I had to explain to him that Mentor 7 had the necessary qualifications to be his mentor. I also needed to explain to him what the mentoring task entailed. Mentor 5, on the other hand, wanted to observe his mentee, in person, to gauge leadership potential. Mentor 5 did not believe that his mentee would provide him with the information he needed to mentor properly, because he believed that written communication could be used to convey an inauthentic image of oneself. Thus, he did not seem to trust that others would present themselves in a way that he viewed would be authentic representations of themselves. Mentor 8, as mentioned earlier, could be said to have a high propensity to trust because he stated that he approaches all situations similarly; he makes himself vulnerable to others first. Thus, a variety of expectations and responses can be observed in the CLM environment.

The CLM’s highly ambiguous nature could provide an appropriate environment to investigate the relationship between propensity to trust and intention to trust. In addition to mentors and mentees not knowing each other, participants also have very little understanding of how to approach the mentoring task, a decidedly ambiguous task, especially within an online environment that does not provide for body language or other cues normally found in face-to-face situations. Issues that influence the nature of the relationship between propensity to trust and intention to trust can also be explored. This is of import not only to virtual mentoring, but it may also provide insights for virtual teams, which Gill et al. believe could be assisted by research into how trust develops and is maintained over time.

10.6.3. A situated perspective on becoming a leader

As previously mentioned, the systemic study of mentor-mentee relationships in an asynchronous virtual environment can afford insights into how mentees begin to view themselves as leaders. This perspective of coming to know how to participate within a
particular community and use its tools is aligned with situated theories of knowing and becoming (Brown, Collins, & Duguid, 1989). Its use in future research would provide meaningful insights for leader development (Drath & Palus, 1994). Within the present study, Mentor 8 stated that mentoring afforded his reflection upon “the tools” of Catholic leadership, which he had learned through his own process of becoming a leader, and that he hoped to share this understanding with his mentee. As with cognitive apprenticeship (Brown et al., 1989), mentoring provides a way for mentees to become enculturated into a particular community. Mentees are provided access to a community’s explicit knowledge by becoming acquainted with its stories and concepts (Cook & Brown, 1999). For instance, the audio material introduced concepts of Catholic leadership to mentees, who then sought their mentors’ personal stories about negotiating the use of these concepts, both within and outside the organization. In addition to these explicit forms of understanding, mentees may be exposed to the tacit knowledge associated with skills and genres for framing mentoring discussions, especially since mentors model these skills when framing their own discussions with their respective mentees (Cook & Brown, 1999). Thus, the mentor becomes a model (Hezlett & Gibson, 2005) for how Catholic leaders discuss issues when mentoring.

By exploring how mentees increasingly participate in leadership situations, future studies can gain an understanding of the process by which new leaders become full-fledged members of a Catholic volunteer leadership community. For instance, within this study, Mentee 8 did not view himself as a leader because he did not believe that he had yet met the criteria for being a Catholic leader. Thus, though he was officially a leader within the organization, he did not believe himself to be a full-fledged member of the leadership community. He viewed becoming a Catholic leader as a lived process, and he indicated that one of his first steps toward becoming one would be to employ one of the tools of Catholic leaders, the utilization of a consistent and active prayer life. Future research can be used to identify features of mentoring that afforded the development of identity and knowing.
10.6.4. Research approach

While a multiple case study approach enabled me to identify issues relating to participants' mentoring experiences and relationships and how these were afforded by the CLM's design, this research approach is less suited to understanding the complexities of these phenomena once identified (Stake, 2006). Other qualitative methods for studying these phenomena might provide different perspectives on issues that have been highlighted in this study. For instance, phenomenology (Creswell, 2007) could be used to explore the essence of sharing within the program, the meaning of being a mentor or mentee, the becoming of a leader, or the adapting of oneself to a virtual environment while building a mentoring relationship.

Once constructs have been more fully developed, quantitative studies would be useful in determining the relationships among variables through regression to determine predictive relationships for mentoring success or factor analysis for exploring latent constructs. Quantitative or mixed method studies provide another means for understanding how mentoring relationships develop and influence leader or leadership development. As such, these methods can assist in further clarifying relationships among salient variables that emerge within this area of study.

10.7. Conclusion

This study provided insights into the process of mentoring with respect to the assumptions and approaches that contributed to the mentoring experiences and relationships of those participating in a virtual, asynchronous mentoring program for volunteer Catholic leaders. Researchers, such as McCauley (2005) and Wanberg et al. (2007), have called for a greater understanding of these processes, especially from a relational perspective. This study responded to this call by presenting rich, descriptive cases about how mentoring relationships developed within the context of the CLM. This study also laid a foundation for research into how mentees learn to become leaders within a volunteer leadership context—a context that is of great social value, but one that has largely been neglected by research.
In the study, leader development was perceived to be influenced positively by mentoring experiences in which mentees felt they could share their insights, ideas, and experiences without judgement. Moreover, this study revealed many aspects of mentors’ experiences, which have not been explored to as great an extent as those of mentees in the existing literature (Hezlett & Gibson, 2005). I found that mentors’ beliefs about the nature of mentoring, their role in mentoring, and approaches to mentoring contributed to whether or not they chose to continue to mentor a willing CLM mentee. This study revealed assumptions about mentoring that influenced the participation of experienced leaders who voluntarily chose to mentor potential and new leaders while also revealing mentees’ experiences within the program.

Consequently, these findings are of use to those who want to implement similar programs. Those considering implementing such a program must consider leaders’ beliefs about mentoring at a distance and factor these into the development of selection criteria and the design of appropriate training for the program’s success. Similarly, new and potential leaders being considered as mentees must be selected using criteria that make them a better fit for the program, such as having the will to commit the time to the program and openness to being mentored. Through this study, insights into mentoring approaches that worked most effectively within this environment and how these contributed to the development of complementary relationships were gained. Moreover, the portfolio review, itself, holds promise as a mentoring innovation, and studying its potential in contributing to the development of the mentoring relationship is warranted.

Future research into how mentoring relationships influence leader development, as well as how these can then foster organizational leadership development are warranted. These goals can be achieved through a systematic and systemic study of virtual mentoring processes within context, through future iterations of the CLM and related programs. Future studies can also empirically study the use of mentoring platforms, from computer-supported collaborative learning environments to social media, that are designed to embody particular theories or to afford different kinds of communication, interactions, and learning. Through a comprehensive study of mentoring in situ, greater understanding of the dynamics of virtual mentoring for voluntary leadership development can be developed. Questions about how such programs
contribute to increased organizational leadership capacity in nonprofit organizations can then be addressed.

In conclusion, this set of case studies has contributed to thick description, which researchers and practitioners can use to inform their own understanding when developing their research agendas and programs. These cases have provided insights into the program’s development and implementation, the experiences of mentors and mentees, and the challenges and opportunities associated with conducting a study of this kind. Its foundation laid, research to advance our understanding of virtual mentoring for volunteer leadership development continues to sound its call.
References


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Appendix A.

CLM Orientation Documents

The following documents are included in this appendix:

- Welcome document for mentees;
- CLM mentor orientation document;
- CLM mentee orientation document.

Welcome Document for Mentees

Hi (Mentee’s name),

I have prepared this handout to answer some questions you may have about the program. If you have more questions, please do not hesitate to email me at xxxxx@xxxxx or text me at xxx-xxx-xxxx.

God bless,

Sheryl Guloy

Doctoral Candidate-SFU

Catholic Leadership?

Have you ever wondered what it means to be a Catholic leader? Did you know that there is a particularly Catholic approach to leadership that you can use in both your everyday life and in (host organization’s name)?

Catholic Leadership Mentoring (CLM)

Over the course of the Catholic Leadership Mentoring (CLM) program, you will come to understand more about this Catholic approach to leadership and what it can mean for your life and service. Your companion and mentor on this journey of understanding will be (mentor’s name), who will share with you his experiences as a leader in (host organization’s name)—and as a Catholic leader in life.

Questions about the CLM

1) So what will you need to do?

You will be listening to audio material about Catholic leadership with (mentor’s name). The audio files are each 27 minutes long. (Mentor’s name) and you can choose topics from the audio library to discuss online with each other. I will give you access to an online account for the audio, as well as one for the discussion forum you will be using.

2) For how long will you have to do this?
(Mentor’s name) and you will participate in the CLM for six months. However, your participation is purely voluntary. This means that we will respect your right to withdraw from the program should you wish to do so.

3) How long will the CLM take per week?

The CLM will take a minimum of 1 to 1.5 hours per week. Of course, if you find yourself really interested in the discussion or in writing reflections, you can take more time. Basically, (Mentor’s name) and you will decide how deeply you want to discuss the audio material.

4) Do you need to meet with your mentor?

The CLM is entirely online. You will be listening to audio material and discussing it on your own time; you do not need to meet in person or online. Of course, (mentor’s name) and you will need to discuss how often you will be checking for each other’s notes in the discussion forum. You will have time to discuss this during the CLM Orientation Session.

5) What is the Orientation Session?

During the orientation, you will meet with (mentor’s name). This session will be videoconferenced. If you do not have a video camera for your laptop or computer, please let me know. We will figure out the best way for all three of us to communicate online. If necessary, I will meet with you and you can use my laptop for the videoconference with (mentor’s name).

During this session, you will find out more about the online environments you will be using to listen to and discuss the audio material. (Mentor’s name) and I will answer your questions about the CLM.

6) Will your participation be confidential?

Yes, your participation will remain confidential.

Your identity will be kept confidential when I report the results of the CLM. In addition, a code of conduct exists for all of us ( (host organization’s name), (mentor’s name), you, and me) to follow. This code is similar to the one used in (host organization’s name), which requires us to be respectful in our conversations and to keep our conversations confidential.

During the CLM, your online discussions with (mentor’s name) must remain confidential. Please do not share this information with anyone. (Mentor’s name) will be required to do the same.

7) What do you need to do for the research portion of the study?

In addition to your listening to and tagging of audio material, as well as your active participation in discussions with (mentor’s name), you will need to do the following:

- Submit a consent form
- Complete an online questionnaire at the beginning of the program
- Complete an online questionnaire at the end of the program
• Fill out short weekly logs online
• Cut and paste your most important notes with (mentor’s name) into a special portfolio view in the online environment
• If invited, participate in an interview

8) What happens if I complete all of these research tasks in a timely manner?

During the orientation session, I will give you information on the CLM research incentives. These incentives are a way for me to thank you for contributing data to my research study. I will give you more details about the incentives during the orientation session. (Hint: It involves opportunities to win $50 prepaid/gift cards.)

Thank you for participating in the CLM!

CLM Mentor Orientation Document

CLM Mentor Orientation

What do you mean by mentoring?

Mentoring can be described as a relationship in which a more experienced person (mentor) provides guidance, support, and advice to a less experienced person (mentee). The purpose of this relationship is to help the mentee become more aware of the ways of being or thinking that is shared by a particular community. As a result, mentoring is a very personal experience that enables you, as mentors, to use the insights and experiences you have gained to guide, support and help your mentees discover or construct for themselves what it means to “be” and “see” as leader. Within the program, Catholic Leadership Mentoring (CLM), your role is to help facilitate understanding of how to be a Catholic leader, especially within (host organization’s name).

What is my role as a mentor?

As mentors, you will be working with your mentees to help them understand what it means to lead as a Catholic. Your principal role will be to help your mentee understand the audio material and its implications for leadership within the context of (host organization’ name). For instance, you can provide your mentee with insights on how an experienced Catholic leader interprets the principles of Catholic leadership and provide context on how these have been applied within (host organization’s name).

In addition, you can share what it means to be a Catholic leader in life. In this way, mentees can more easily see how being a Catholic leader encompasses other areas of their lives. Moreover, you may want to have mentees examine their own service within and beyond the community to see how these interrelate.

What should mentees expect from the CLM?

Mentees should expect to have a deeper understanding of what it means to be a Catholic leader within the Catholic and (host organization’s name) communities, as well as within the community-at-large.
What would I like for mentees to take away with them after the CLM?

During the CLM Orientation Session, you will have the opportunity to meet with your mentee and explain to them your personal vision for your mentoring discussions. Prior to this session, take the time to reflect upon what you would like your mentees to learn or understand by the end of the program. Think about your own personal goals as mentor. What are your reasons for accepting the invitation to be mentor potential and new leaders?

What if I have questions?

You are a mentor, but you do not need to know everything.

Keep your questions in mind and reflect upon them. Enter these into your weekly logs. Let me know how you are dealing or have dealt with them. Logging your questions will help me understand how to support mentors better when designing future mentoring programs.

Don’t hesitate to contact me if you have questions or concerns about situations that you are facing. (My contact info: xxxxx@xxxx or xxx-xxx-xxxx)

How do I start our online conversation?

1) Introduce yourself to your mentee. Find out more about your mentee. Get to know each other.

2) Negotiate expectations with respect to the following:
   - Timelines
   - How often you will check Audio Re-Searcher and Knowledge Forum
   - How quickly you will respond to posted notes or contribute to the discussion

3) Build trust. Ensure your mentees that you will take their questions, answers, and comments seriously. Be open to their insights. Show them that you will respect their thoughts and decisions.

4) Please keep these discussions online. If you are in contact with your mentee outside of the mentoring environment, please remind each other to discuss the audio material online. Why? You can explain that one of the benefits of keeping the discussion online is that both of you have time to reflect before your respond. In addition, you will both be able to review past notes you have written to each other and trace your thoughts and insights.

If you run into your mentee “offline” and feel that this encounter in some way facilitated your understanding of your mentoring relationship or will shape your discussions with them, write about the encounter in your weekly log.
CLM Mentee Orientation

Mentee Orientation

What do you mean by mentoring?

The Catholic Leadership Mentoring (CLM) program is not a training program. Think of the mentoring experience as a journey during which you learn to understand or see new things about leading as a Catholic, especially as a (host organization’s name). Your companion on this journey is a leader who has walked this path before you. As a mentoring program, it involves having your mentor share with you understandings and experiences about what it means to lead by one’s faith.

What is my role as a mentee?

As mentees, you will have the opportunity to learn more deeply about the principles of Catholic leadership. Listen to the audio material and think about how it applies to your service in (host organization’s name) and life in general. Does it make sense to you? Do you have questions? Do you disagree? Is it relevant to you?

These are all questions or issues that you can discuss online with your mentor.

What should I expect to learn from this experience?

You will learn about the principles of Catholic leadership, especially within the context of (host organization’s name).

However, this question can be rephrased as follows: What do I want to take away from this experience? Your mentor and the audio material are important to the CLM, but your contribution to the program is equally important. What would you like to contribute? What would you like to gain from it? Reflect upon these questions as you go through the CLM.

How do I start our online discussion?

1) Introduce yourself to your mentor. Give your mentor an idea about how you view the CLM. Ask your mentor questions. Share or discuss your ideas with your mentor. You are both deepening your understanding through discussion.

2) Negotiate expectations with respect to the following:

   • Timelines
   • How often you will check Audio Re-Searcher and Knowledge Forum
   • How quickly you will tag the audio; respond to posted notes; and contribute to the discussion

3) Remember that your mentor takes your questions, answers, and comments seriously. Participate and be open. Do not feel that you need to demonstrate your mastery of the audio material. The aim is to discuss and gain insights on what it means to be a Catholic
leader. Your goal is to reflect and obtain a deeper understanding of these principles and how you can apply them in your life.

4) Please keep these discussions online. If you are in contact with your mentor outside of the mentoring environment, please remind one another to discuss the audio material online. Why? Keeping the discussion online will allow you time to reflect on your responses. In addition, you will both be able to review past notes you have written to each other and trace your thoughts and insights.
Appendix B.

CLM Audio Summaries

The following document provided mentors and mentees with background on each of the audio material topics. It was uploaded into Knowledge Forum, and participants were directed toward it during the orientation session.
<table>
<thead>
<tr>
<th>Title</th>
<th>Topics Covered</th>
</tr>
</thead>
</table>
| 1. An Overview of Catholic Leadership | How can Catholics bring their faith into their leadership lives—from work to families to communities? This segment provides an overview of the entire series. Fr. Spitzer introduces the major topics that will be discussed over the course of the series and explains how these interrelate with one another. These include:  
- Faith life and leadership  
- Ethics and leadership  
- Virtue and leadership  
- Principle-based versus utilitarian ethics  
- Leadership principles: Theology of success and failure  
- Primary leadership responsibilities and their application |
| 2. The First Two Levels of Success | How leaders define success influences how others view success. Fr. Spitzer discusses the following:  
- The four levels of success, happiness, and Catholic leadership  
- Ego-In Levels: I and II  
- Level I Success: Immediate and material gratification  
- Level II Success: Ego gratification  
- Pitfalls of Level I and II  
- Ego-Out Levels: III and IV  
- Introduction to Levels III (Contribution) and IV (Ultimate) |
| 3. The Higher Levels of Success | How leaders define success influences how others view success. Fr. Spitzer discusses the following:  
- Ego-Out Levels: III and IV  
- Level III: Contributive  
- Level IV: Ultimate- Living for God |
| 4. Getting Started on Prayer - Part I - Spontaneous Prayer | How do you build a prayer life? Fr. Spitzer explains how to develop a contemplative life, which the Holy Spirit uses to work within your leadership lives. He discusses:  
- Kinds of spontaneous prayer  
- Spontaneous prayers for different situations  
- Answers to prayers  
- God’s purposes and prayer  
- Prayer and transformation |
| 5. Getting Started on Prayer - Part II - | How does personal transformation gain momentum? Fr. Spitzer explains the importance of the Holy Eucharist to one’s life. He discusses: |
| The Eucharist | - The meaning of the Eucharist  
- Importance of the Eucharist for leaders  
- The graces received from the Eucharist  
- How the graces work on leaders |
| 6. Getting Started on Prayer - Part III - Following the Holy Spirit | How do you follow the action of the Holy Spirit in your personal, work, and leadership lives? Fr. Spitzer discusses:  
- The graces that the Holy Spirit gives you  
- How to recognize the Holy Spirit  
- The light at the end of the tunnel  
- Cooperating with the Holy Spirit |
| 7. Getting Started on Prayer - Part IV – Contemplation | What does a contemplative life have to do with the active life of leader? Fr. Spitzer discusses:  
- How to begin a contemplative life even when busy  
- How a contemplative life deepens spiritual and leadership life  
- Steps in contemplative prayer  
- The experience of contemplation (including snippets about God being love and The Parable of the Prodigal Son translated for our day) |
| 8. Getting Started on Prayer-Part V- Contemplation (cont’d) | How do you build a contemplative life when you have an extremely lifestyle? Fr. Spitzer discusses:  
- Steps in contemplative life  
- Empathetic connection to God  
- How contemplative knowledge infuses your leadership |
| 9. Virtue-Based Ethics, Part I -What Happened to Organizational Ethics? | What happened to Organizational Ethics? Fr. Spitzer discusses:  
- The rise of utilitarian/situation ethics over principle-based ethics  
- Restoration of principle-based ethics  
- Practical steps for restoring organizational ethics  
- Catholic leadership and the restoration of principle-based/virtue-based ethics |
| 10. Virtue-Based Ethics, Part II -The End Virtue – Agape | How can Catholic leaders influence the culture? Where do you begin? Fr. Spitzer discusses:  
- What is virtue?  
- Means virtue versus end virtue  
- Agape: The end virtue  
- Agape and leadership |
| 11. Virtue-Based Ethics - Part III - The End Virtue - Agape (cont’d) | How do you cultivate the virtue of agape in your leadership? Fr. Spitzer discusses:  
- The means virtues of the Beatitudes, agape, and leadership  
- The illusion of the Seven Deadly Sins  
- How the Beatitudes counter the Seven Deadly Sins |
| 12. Virtue-Based Ethics - Part IV - The 7 Deadly Sins | How do you overcome pride and the other deadly sins? Fr. Spitzer discusses:
- The nature of pride and its relationship to the other deadly sins
- Pride and leadership
- How to combat pride through a spiritual life
- Practical strategies for overcoming pride |
| --- | --- |
| 13. Virtue-Based Ethics - Part V - The Silver Rule | How do you bring principle-based ethics back into organizations? Fr. Spitzer discusses:
- Strategies for bringing principle-based ethics into organizations
- The Silver Rule
- Leading through your virtue centre to bring the Silver Rule into organizations
- Strategies for bringing the Silver Rule into organizations
- How to make organizations equitable |
| 14. Virtue-Based Ethics - Part VI - The Golden Rule & Beatitudes | How do the Golden Rule and the Beatitudes transform your leadership and organizations? Fr. Spitzer discusses:
- Jesus’ call to ethical maximalism
- Objections to the Golden Rule and Beatitudes in organizations
- The case for the Golden Rule and Beatitudes in organizations
- The Beatitudes, Golden Rule, and good leadership |
| 15. Virtue-Based Ethics - Part VII - Getting the Golden Rule into Your Organization | How can you bring the Golden Rule into your organization? Fr. Spitzer discusses:
- How prayer lives help to bring the Golden Rule into organizations
- How to bring the Golden Rule into pluralistic organizations
- Five commitments that can orient the organization to the Golden Rule |
| 16. Theology of Failure | How can you use your virtue core to get you through times of failure? Fr Spitzer discusses:
- The kinds of problems leaders experience
- How to deal with those issues that really challenge a leader
- The four-step process for handling these challenges |
| 17. First Responsibility of Leaders – Vision | How do leaders view success and what are your responsibilities as leaders?
- Theology of success
- Four responsibilities of all leaders
- How to develop a vision
- The need for a Catholic approach in vision building |
| 18. Second | How does your faith life contribute to vision building and problem solving? Fr. Spitzer discusses: |
| Responsibility of Leaders - Problem Solving | - The balancing act of leadership  
- How your spiritual life allows you to solve problems effectively  
- How Catholic leaders are at an advantage when using your faith to lead |
| 19. Third & Fourth Responsibilities of Leaders - Quality & Team Spirit | How does a Catholic leader set quality and foster team spirit? Fr. Spitzer discusses:  
- Quality in terms of people, product, and process  
- Accountability, trust, and prayer life  
- How to deal with mistakes  
- Team Responsibility  
- Developing Co-Responsibility |
| 20. Esprit de Corps - The Challenge of Bringing Catholic Principles into Pluralistic Organizations | How can a Catholic leader build esprit de corps within an organization and leave a legacy? Fr. Spitzer discusses:  
- What makes people charismatic leaders  
- How Catholic leadership brings out esprit de corps  
- How to deal with leadership challenges in pluralistic organizations  
- How the five commitments can be brought into organizations to leave a lasting legacy |
| 21. Eight Principles of Catholic Leadership - Part I | How do you achieve Success Four as leaders? Fr. Spitzer provides a framework for understanding Catholic leadership through the discussion of the following:  
- Review of the Four Levels of Success  
- Why Success Four is our objective  
- Four-Step Method for achieving effective Catholic leadership  
- Principles of Catholic Leadership Framework  
- First two principles of Catholic Leadership (contemplation as foundation) |
| 22. Eight Principles of Catholic Leadership - Part II | How does Step 2 of the Four-Step Method build upon Step 1? Fr. Spitzer summarizes how the principles that build up your virtue core inform your leadership by discussing:  
- How your virtue core builds upon your contemplative life  
- The development of virtue through Principles 3 and 4  
- How agape, the Beatitudes, and turning away from the Seven Deadly Sins lead to effective leadership |
| 23. Eight Principles of Catholic Leadership - Part III | How do you bring principle-based ethics into your organization? How do you lead? Fr. Spitzer summarizes how you can bring the Golden Rule into organizations and how you can lead by grace by discussing the following:  
- Step 3 of the Four-Step Method (The Silver Rule; The Golden Rule)  
- Step 4 of the Four-Step Method (The Triangle Method and Grace)  
- How the Eight Steps of Catholic Leadership lead to Success Four and agape in organizations |
Appendix C.

Consent Forms

The following documents are included in this appendix:

- Organizational Consent Form;
- Mentor Consent Form;
- Mentee Consent Form;
- Group Interview Consent Form;
- Focus Group Consent Form.
Organizational Consent Form

ORGANIZATIONAL CONSENT FORM TO PARTICIPATE IN RESEARCH STUDY

Title: Virtual Mentoring for Volunteer Leadership Development

Primary Investigator: Sheryl Guloy

Sheryl Guloy is a doctoral student of Educational Technology and Learning Design, at Simon Fraser University’s Faculty of Education. She is the principal investigator for this study and can be contacted by phone, at [blank], or by e-mail at [blank].

Supervisor: Dr. Kevin O’Neill
Department: Faculty of Education

Purpose
The purpose of this study is to explore how online mentoring can influence leadership development and succession in Catholic voluntary organizations. This study involves experienced leaders mentoring to volunteer members, as they work through audio material about leadership, within the context of Catholic organizations. This material will be based on the work of Fr. Robert J. Spitzer, S.J. (PhD). By participating in this study, the organization will further understand about online mentoring, volunteer leadership, and leadership theory.

To gain a deeper insight on how the mentoring program can be better implemented, as well as how it is perceived by the organization’s current leadership, focus groups; interviews; and an examination of extant data (leadership development documentation and organizational charts) will be conducted. The focus groups will last for approximately 90 minutes; the interviews will last for a maximum of 60 minutes.

Procedures

Risk, Confidentiality, and Voluntary Participation
All data will be stored in a locked office, in Canada, in password-protected files or as hard copies in a locked cabinet. To guarantee anonymity when reporting this study, the names of the organization and the participants will be changed to pseudonyms and identifying information will be removed from all reported data.
Page 2 of 2

The organization’s participation in this research is voluntary. At any time and for any reason, you can choose to withdraw from the study, with no negative consequences to your organization.

Conditions of Participation

I understand that the organization is free to withdraw consent and discontinue participation, at anytime, without negative consequences to the organization or its members.

All parties involved with this research will keep the organization’s and participants’ identities confidential.

I understand that my participation in this study is CONFIDENTIAL (i.e., the researchers will know, but will not disclose my identity). Pseudonyms and any identifying data will be removed so that the organization’s identity, as well as that of its members, will remain anonymous during the reporting of this research. I understand that the data from this study may be published.

Participation in this research study is in accordance with policies and procedures of the SFU Office of Research Ethics, which means that you can contact this office about any issues that you may have with the study. If you have any questions or concerns about the organization’s or its members’ rights or treatment as research participants, please contact Dr. Hal Weinberg (Director of the SFU Office of Research Ethics) by email at [email]

If you would like to obtain the results of this study or if you have other questions about it, please contact Sheryl Guloy at [email] or [email].

May the researcher contact you about this study at a later date? ___Yes ___No

Consent

1) This is to certify that I have read and understood the above information about the purpose, procedures, benefits, and risks associated with the organization’s participation in this research study. ON BEHALF OF THE ORGANIZATION (Name the organization and the division)__________.

I FREELY CONSENT AND VOLUNTARILY AGREE TO THE ORGANIZATION’S PARTICIPATION IN THIS STUDY.

NAME:

SIGNATURE:

POSITION: (please write your title for the organization to whom you belong)

DIVISION: (i.e., chapter, cell, division, or office for your organization)

ORGANIZATION: (please write the name of your organization)
Mentor Consent Form

Page 1 of 3

MENTOR CONSENT FORM TO PARTICIPATE IN RESEARCH STUDY

Title: Virtual Mentoring for Volunteer Leadership Development

Primary Investigator: Sheryl Guloy

Sheryl Guloy is a doctoral student of Educational Technology and Learning Design, at Simon Fraser University’s Faculty of Education. She is the principal investigator for this study and can be contacted by phone, at [REDACTED], or by e-mail at [REDACTED].

Supervisor: Dr. Kevin O’Neill
Department: Faculty of Education

Purpose
The purpose of this study is to explore in what ways online mentoring can influence leadership development and succession in Catholic voluntary organizations. This study involves experienced leaders mentoring to volunteer members, as they work through audio material about leadership, within the context of Catholic organizations. This material will be based on the work of Fr. Robert J. Spitzer, S.J. (PhD). By participating in this study, the organization will further understanding about online mentoring, volunteer leadership, and leadership theory.

Procedures
In this study, you will be paired with a mentee, from your organization, and asked to listen to audio material about leadership, within the context of Catholic organizations. The audio material will be 27 minutes long. After you have both listened to the audio material, your mentee and you will discuss the material with one another. These discussions will take place in an online environment designed for this programme. Your role will be to help your mentee understand the material and its implications for leadership, within the Catholic context of your organization. For instance, you can provide your mentee with insights into how an experienced Catholic leader interprets the audio material on the principles of Catholic leadership, as well as provide context on how or why it has been applied within the organization. At the end of the programme, you will develop a portfolio using notes from your online discussions. You will communicate with your mentee through a password-protected, virtual mentoring environment. You are required to honour the following code of conduct, which will ensure that respect and confidentiality of the online discussions are maintained.
Code of Conduct

- What is discussed between mentors and mentees must remain confidential to both parties and must not be discussed outside of the mentoring environment.
- Should there be a breach of confidentiality, your organization will be informed that a breach has been made and it will have the right to withdraw the organization from the study.
- Should the mentor or mentee feel that the discussion has become inappropriate, the mentor or mentee has the right to withdraw participation in discussing the topic or to withdraw from the study, itself.
- The researcher will follow the mentor-mentee discussions and will intervene should the discussions begin to take an inappropriate tone to ensure the integrity of the discussions.
- The researcher guarantees the security of the online environment, because all files will be stored within Canada and passwords given to all participants involved in the study. However, it is the responsibility of the mentors and mentees to ensure that each honours this code of conduct to guarantee that confidentiality and respect be maintained during the online discussions over the course of this study.

In addition, you will fill out questionnaires at the beginning and end of the study, as well as weekly logs tracking your progress through the programme. You may be asked to participate in interview sessions.

You have six months to discuss the material. You will use Audio Re-searcher, a web-based tool (designed by SFU graduate student, Frank Zander) to tag the content of the audio material. All online environments are secure and housed in Canada.

Risk, Confidentiality, and Voluntary Participation
All data will be stored, in Canada, on a confidential and secure server, thus ensuring the security of the online environments. As long as all parties honour the code of conduct, the anticipated risks, such as the unauthorized disclosure of personal information shared during the online discussions, will be minimal. Should the discussion begin to take an inappropriate direction, the researcher will intervene to make sure that the discussion remains respectful. Only the researchers, your organization, and your mentee will know your identity. All parties involved with this research are obligated to keep your identity confidential. However, given that data is electronically transferred, via the Internet, confidentiality cannot be completely assured. Should there be a breach of confidentiality, your organization will be informed and it will have the right to withdraw from the study. To guarantee your anonymity when reporting this study, your name will be changed to a pseudonym and identifying information will be removed from all reported data.

Permission for your participation in the study has already been obtained from the organization. However, your participation in this research is voluntary. At any time, you can choose to withdraw from the study, with no negative consequences to your organization or you. Should, for any reason, your organization choose to withdraw its
participation, you will be informed of the decision and your participation in the study will cease, with no negative consequences resulting from this decision. Any withdrawal of participation also means that data collected prior to the withdrawal will be disposed of immediately and will not be used during the data analysis or reporting.

Conditions of Participation
I understand that I am free to withdraw my consent and discontinue my participation, at anytime, without negative consequences to my organization or myself.
All parties involved with this research will keep participants’ identities confidential, as indicated by the above code of conduct. By signing this consent form I agree to honour this code of conduct.
I understand that my participation in this study is CONFIDENTIAL (i.e., the researchers will know, but will not disclose my identity). Pseudonyms and any identifying data will be removed so that my identity will remain anonymous during the reporting of this study. However, given that the data is electronically transferred, complete assurance of confidentiality cannot be guaranteed.
I understand that the data from this study may be published.

Participation in this research study is in accordance with policies and procedures of the SFU Office of Research Ethics, which means that you can contact this office about any issues that you may have with the study. If you have any questions or concerns about your rights or treatment as a research participant, please contact Dr. Hal Weinberg (Director of the SFU Office of Research Ethics) by email at

If you would like to obtain the results of this study or if you have other questions about it, please contact Sheryl Guloy at or.

May the researcher contact you about this study at a later date? ___Yes ___No

Consent
This is to certify that I have read and understood the above information about the purpose, procedures, benefits, and personal risks associated with my participation in this research study. I FREELY CONSENT AND VOLUNTARILY AGREE TO HONOUR THE CODE OF CONDUCT AND PARTICIPATE IN THE STUDY.

___I agree to honour the code of conduct and to participate

Name: __________________________________________________________________________

Signature: ___________________________ Date: ______________
MENTEE CONSENT FORM TO PARTICIPATE IN RESEARCH STUDY

Title: Virtual Mentoring for Volunteer Leadership Development

Primary Investigator: Sheryl Guloy

Sheryl Guloy is a doctoral student of Educational Technology and Learning Design, at Simon Fraser University’s Faculty of Education. She is the principal investigator for this study and can be contacted by phone, at [number], or by e-mail at [email address].

Supervisor: Dr. Kevin O’Neill
Department: Faculty of Education

Purpose
The purpose of this study is to explore how online mentoring can influence leadership development and succession in Catholic voluntary organizations. This study involves experienced leaders mentoring volunteer members, as they work through audio material about leadership, within the context of Catholic organizations. This material will be based on the work of Fr. Robert J. Spitzer, S.J. (PhD). By participating in this study, the organization will further understand about online mentoring, volunteer leadership, and leadership theory.

Procedures
In this study, you will be paired with a mentor, from your organization, and asked to listen to audio material about leadership, within the context of Catholic organizations. The audio material will be 27 minutes long. After you have both listened to the audio material, your mentor and you will discuss the material and how it relates to leadership within your organization. These discussions will take place in an online environment designed for this programme. Your mentor and you will work together to determine the direction of the discussion. You will comment on or ask your mentor questions about leadership, as viewed within the context of Catholic organizations. For example, you can ask your mentor about aspects of the material that resonate with you in some way, with regard to the leadership environment in your organization. Conversely, your mentor might ask you how you feel the audio materials relate to leading within your organization. You will communicate with your mentor through a password-protected, virtual mentoring environment. At the end of the programme, you will develop a portfolio using notes from your online discussions. You are required to honour the following code of conduct, which will ensure that respect and confidentiality of the online discussions are maintained.
Code of Conduct

- What is discussed between mentors and mentees must remain confidential to both parties and must not be discussed outside of the mentoring environment.
- Should there be a breach of confidentiality, your organization will be informed that a breach has been made and it will have the right to withdraw the organization from the study.
- Should the mentor or mentee feel that the discussion has become inappropriate, the mentor or mentee has the right to withdraw participation in discussing the topic or to withdraw from the study itself.
- The researcher will follow the mentor-mentee discussions and will intervene should the discussions begin to take an inappropriate tone to ensure the integrity of the discussions.
- The researcher guarantees the security of the online environment, because all files will be stored within Canada and passwords given to all participants involved in the study. However, it is the responsibility of the mentors and mentees to ensure that each honours this code of conduct to guarantee that confidentiality and respect be maintained during the course of this study.

In addition, you will fill out questionnaires at the beginning and end of the study, as well as weekly logs tracking your progress through the programme. You may be asked to participate in interview sessions.

You have six months to discuss the material. You will use Audio Re-searcher, a web-based tool (designed by SFU graduate student, Frank Zander) to tag the content of the audio material. All online environments are secure and housed in Canada.

Risk, Confidentiality, and Voluntary Participation
All data will be stored, in Canada, on a confidential and secure server; thus ensuring the security of the online environments. There are minimal anticipated risks associated with your participation in this study, as long as all honour the code of conduct. Should the discussion begin to take an inappropriate direction, the researcher will intervene to make sure that the discussion remains respectful. Only the researchers, your organization, and your mentor will know your identity. All parties involved with this research are obligated to keep your identity confidential. However, given that data is electronically transferred, via the Internet, confidentiality cannot be completely assured. Should there be a breach of confidentiality, your organization will be informed and it will have the right to withdraw from the study. To guarantee your anonymity when reporting this study, your name will be changed to a pseudonym and identifying information will be removed from all reported data.

Permission for your participation in the study has already been obtained from the organization. However, your participation in this research is voluntary. At any time, you can choose to withdraw from the study, with no negative consequences to your organization or you. Should, for any
reason, your organization choose to withdraw its participation, you will be informed of the
decision and your participation with the study will cease, with no negative consequences resulting
from this decision. Any withdrawal of participation also means that data collected prior to the
withdrawal will be disposed of immediately and will not be used during the data analysis or
reporting.

Conditions of Participation
I understand that I am free to withdraw my consent and discontinue my participation at
anytime without negative consequences to my organization or myself.
All parties involved with this research will keep participants’ identities confidential, as
indicated by the above code of conduct. By signing this consent form you are also agreeing
to honour this code of conduct.
I understand that my participation in this study is CONFIDENTIAL (i.e., the researchers
will know, but will not disclose my identity). Pseudonyms and any identifying data will be
removed so that my identity will remain anonymous during the reporting of this research.
However, given that the data is electronically transferred, complete assurance of
confidentiality cannot be guaranteed.
I understand that the data from this study may be published.

Participation in this research study is in accordance with policies and procedures of the SFU
Office of Research Ethics, which means that you can contact this office about any issues that you
may have with the study. If you have any questions or concerns about your rights or treatment as
a research participant, please contact Dr. Hal Weinberg (Director of the SFU Office of Research
Ethics) by email at [email]

If you would like to obtain the results of this study or if you have other questions about it, please
contact Sheryl Guloy at [email] or [email]

May the researcher contact you about this study at a later date? ___Yes ___No

Consent

This is to certify that I have read and understood the above information about the purpose,
procedures, benefits, and personal risks associated with my participation in this research study.
I FREELY CONSENT AND VOLUNTARILY AGREE TO HONOUR THE CODE OF
CONDUCT AND PARTICIPATE IN THIS STUDY.

____I agree to honour the code of conduct and to participate

Name: ______________________________

Signature: __________________________ Date: __________________________
Group Interview Consent Form

Page 1 of 3

CONSENT FORM TO PARTICIPATE IN RESEARCH STUDY (INTERVIEW)

Title: Virtual Mentoring for Volunteer Leadership Development

Primary Investigator: Sheryl Guloy

Sheryl Guloy is a doctoral student of Educational Technology and Learning Design, at Simon Fraser University’s Faculty of Education. She is the principal investigator for this study and can be contacted by phone, at [REDACTED], or by e-mail at [REDACTED].

Supervisor: Dr. Kevin O’Neill
Department: Faculty of Education

Purpose
The purpose of this study is to explore how online mentoring can influence leadership development and succession in Catholic voluntary organizations. This study involves experienced leaders mentoring to volunteer members, as they work through audio material about leadership, within the context of Catholic organizations. This material will be based on the work of Fr. Robert J. Spitzer, S.J. (PhD). By participating in this study, you will further understanding about online mentoring, volunteer leadership, and leadership theory.

Interviews will be conducted to obtain more in-depth understanding about perceptions on online mentoring for leadership development from the perspective of the current leadership of the organization.

Procedures
You will be interviewed for a maximum of one hour about your perceptions on online mentoring for leadership development. The interview will be audio-recorded and transcribed.

Risk, Confidentiality, and Voluntary Participation
All data will be stored in a locked office, in Canada, in password-protected files or as hard copies in a locked cabinet. There are minimal anticipated risks associated with your participation in this study. To guarantee anonymity when reporting this study, the names of the organization and the participants will be changed to pseudonyms and identifying information will be removed from all reported data.
Permission for your participation in the study has already been obtained from the organization. However, your participation in this research is voluntary. At any time and for any reason, you can choose to withdraw from the study without negative consequence to yourself or your organization. Should, for any reason, your organization choose to withdraw its participation, you will be informed of the decision and your participation with the study will cease, with no negative consequences resulting from this decision. Any withdrawal of participation also means that data collected prior to the withdrawal will be disposed of immediately and will not be used during the data analysis or reporting.

Conditions of Participation
I understand that I am free to withdraw consent and discontinue participation, at anytime, without negative consequences to myself, my membership in the organization, or the organization itself.
I understand that my participation in this study is CONFIDENTIAL (i.e., the researchers will know, but will not disclose my identity). All parties involved with this research will keep my identity confidential. Pseudonyms and any identifying data will be removed so that my identity will remain anonymous during the reporting of this research. I understand that the data from this study may be published.

Participation in this research study is in accordance with policies and procedures of the SFU Office of Research Ethics, which means that you can contact this office about any issues that you may have with the study. If you have any questions or concerns about your rights or treatment as a research participant, please contact Dr. Kevin O’Neill, Associate Professor, Faculty of Education, at [contact information]. If you have further questions, contact Dr. Hal Weinberg, Director, Office of Research Ethics at [contact information].

If you would like to obtain the results of this study or if you have other questions about it, please contact Sheryl Guloy at [contact information].

May the researcher contact you about this study at a later date? ____Yes ____No

Consent
This is to certify that I have read and understood the above information about the purpose, procedures, benefits, and personal risks associated with my participation in this research study. I FREELY CONSENT AND VOLUNTARILY AGREE TO PARTICIPATE IN THIS STUDY.

____I agree to participate (Click on this link to participate in the research study)
Focus Group Consent Form

Page 1 of 3

CONSENT FORM TO PARTICIPATE IN RESEARCH STUDY (FOCUS GROUP)

Title: Virtual Mentoring for Volunteer Leadership Development

Primary Investigator: Sheryl Guloy

Sheryl Guloy is a doctoral student of Educational Technology and Learning Design, at Simon Fraser University’s Faculty of Education. She is the principal investigator for this study and can be contacted by phone, at [redacted], or by e-mail at [redacted].

Supervisor: Dr. Kevin O’Neill
Department: Faculty of Education

Purpose
The purpose of this study is to explore how online mentoring can influence leadership development and succession in Catholic voluntary organizations. This study involves experienced leaders mentoring to volunteer members, as they work through audio material about leadership, within the context of Catholic organizations. This material will be based on the work of Fr. Robert J. Spitze, S.J. (PhD). By participating in this study, you will further understanding about online mentoring, volunteer leadership, and leadership theory.

Focus groups will be conducted to obtain more in-depth understanding about perceptions on online mentoring for leadership development from the perspective of the current leadership of the organization.

Procedures
You will participate for approximately 90 minutes in a focus group, which will focus on perceptions about online mentoring for leadership development. The focus group will be audio-recorded and the recording transcribed.

Risk, Confidentiality, and Voluntary Participation
All data will be stored, in Canada, on a confidential and secure server. There are minimal anticipated risks associated with your participation in this study. By consenting to participate in the focus group, you confirm that any information you encounter will be kept confidential and not
revealed to parties outside the focus group. Although the objective is to maintain confidentiality, it cannot be guaranteed. To guarantee your anonymity when reporting this study, your name will be changed to a pseudonym and identifying information will be removed from all reported data.

Permission for your participation in the study has already been obtained from the organization. However, your participation in this research is voluntary. At any time, you can choose to withdraw from the study, with no negative consequences to yourself or your organization. Should, for any reason, your organization choose to withdraw its participation, you will be informed of the decision and your participation with the study will cease, with no negative consequences resulting from this decision. Any withdrawal of participation also means that data collected prior to the withdrawal will be disposed of immediately and will not be used during the data analysis or reporting.

Conditions of Participation
I understand that I am free to withdraw my consent and discontinue my participation at anytime without negative consequences to myself, my membership in the organization, or the organization itself.
I understand that my participation in this study is CONFIDENTIAL (i.e., the researchers will know, but will not disclose my identity). I understand that I am required to keep confidential all information I encounter during the focus group. All parties involved with this research will keep participants’ identities confidential. However, confidentiality can only be guaranteed to the extent that all members of the focus group honour this condition and, therefore, complete assurance of confidentiality cannot be guaranteed.
Pseudonyms and any identifying data will be removed so that my identity will remain anonymous during the reporting of this research.
I understand that the data from this study may be published.

Participation in this research study is in accordance with policies and procedures of the SFU Office of Research Ethics, which means that you can contact this office about any issues that you may have with the study. If you have any questions or concerns about your rights or treatment as a research participant, please contact Dr. Kevin O’Neill, Associate Professor, Faculty of Education, at [redacted] or [redacted]. If you have further questions, contact Dr. Hal Weinberg, Director, Office of Research Ethics at [redacted] or [redacted].

If you would like to obtain the results of this study or if you have other questions about it, please contact Sheryl Guloy at [redacted] or [redacted].

May the researcher contact you about this study at a later date? ___Yes ___No
Consent

This is to certify that I have read and understood the above information about the purpose, procedures, benefits, and personal risks associated with my participation in this research study. I FREELY CONSENT AND VOLUNTARILY AGREE TO PARTICIPATE IN THIS STUDY.

____ I agree to participate (Click on this link to participate in the research study).
Appendix D.

Weekly Log

The following documents are included in this appendix:

- Mentor Weekly Log;
- Mentee Weekly Log.
Weekly Log

This log is to be completed at the end of each week. Therefore, it refers to the week that has just passed, beginning Sunday and ending Saturday. All logs must be submitted before Sunday. If you have any questions about the log, please email [email protected] Thanks, Sheryl

Q1. Name:
   Answer:

Q2. Today's date
   Year: [ ] Month: [ ] Day: [ ]

Q3. Which audio segment(s) did you discuss this week?

Q4. To what extent do you agree with each of the following statements

<table>
<thead>
<tr>
<th>Statement</th>
<th>Disagree</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7 Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I found the audio material we discussed this week useful</td>
<td></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
</tr>
<tr>
<td>I found the online discussion I had with my mentee useful this week</td>
<td></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
</tr>
<tr>
<td>My relationship with my mentee is going well this week</td>
<td></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
</tr>
<tr>
<td>I am satisfied with the mentoring process this week</td>
<td></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
<td><img src="Image" alt="Circle" /></td>
</tr>
</tbody>
</table>

Q5. Was there anything in particular that you felt worked well during the mentoring program this week?


<table>
<thead>
<tr>
<th>Q6</th>
<th>Was there anything in particular that you felt did not work well during the mentoring program this week?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q7</td>
<td>What were your goals for the mentoring program this week?</td>
</tr>
<tr>
<td>Q8</td>
<td>To what extent were these goals achieved?</td>
</tr>
<tr>
<td>Q9</td>
<td>Other comments:</td>
</tr>
</tbody>
</table>

Submit

Close
Mentee Weekly Log

Weekly Log

This log is to be completed at the end of each week. Therefore, it refers to the week that has just passed, beginning Sunday and ending Saturday. All logs must be submitted before Sunday. If you have any questions about the log, please email [email protected]. Thanks, Sheryl.

Q1. Name:  
Answer:  

Q2. Today's date  
Year   Month   Day  

Q3. Which audio segment(s) did you discuss this week?  

Q4. To what extent do you agree with each of the following statements  

<table>
<thead>
<tr>
<th>Statement</th>
<th>Disagree Strongly</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7 Agree Strongly</th>
</tr>
</thead>
<tbody>
<tr>
<td>I found the audio material we discussed this week useful</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I found the online discussion I had with my mentor useful this week</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My relationship with my mentor is going well this week</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am satisfied with the mentoring process this week</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q5. Was there anything in particular that you felt worked well during the mentoring program this week?  


Q6. Was there anything in particular that you felt did not work well during the mentoring program this week?

Q7. What were your goals for the mentoring program this week?

Q8. To what extent were these goals achieved?

Q9. Other comments:
Appendix E.

Interview Protocols

The following document is included in this appendix:

• Participant Interview Protocol (Including Portfolio Review)

Participant Interview Protocol

Semi-Structured Interview with participants (approximately 30 minutes to 1 hour)

Note: When interviewing mentors, use mentee.

Record sessions.

1) What were your goals for the mentoring programs at the start? Why? Have these been met?

2) Have they evolved? If yes, in what way and why? If no, why not?

3) Can you describe your relationship with your mentor?

4) Can you describe your experience with the mentoring process? What have been your challenges? What have you enjoyed?

5) How useful did you find the audio material? How did you find Audio Re-Searcher?

6) How did you find your online discussion? How did you find Knowledge Forum?

7) Was there anything in particular that you felt worked well during the mentoring program over the past two months? Was there anything in particular that you felt did not work well during the mentoring program over the past two months?

8) Future: How will you approach the next two months in the program?

Additional questions will be asked during the interview to explore emerging issues or probe further.

For the final interview:

Include a portfolio review:

Ask participant to go through the created portfolio. If the participant has not created a portfolio, ask him or her to review the Knowledge Forum discussion notes. Allot 10 minutes for review. Then, ask what notes were found significant and why.
Appendix F.

Questionnaires

The following documents are included in this appendix:

- Pre-Implementation Questionnaire
  - Mentor version
  - Mentee version
- Re-Match Questionnaire (administered at the beginning of the rematch)
  - Mentor version
  - Mentee version
- Post-Implementation Questionnaire
  - Mentor version
  - Mentee version.
Mentor Pre-Implementation Questionnaire

**Mentor Questionnaire I**

Thank you for participating in the Catholic Leadership Mentoring Program. Please fill out the following survey. Please make sure to complete all three sections of this survey. It should only take 5 to 10 minutes to complete. Thanks, Sheryl Guloy

### Part I

Please answer the following questions.

<table>
<thead>
<tr>
<th>Q1</th>
<th>Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Answer:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q2</th>
<th>Age:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Answer:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q3</th>
<th>Sex:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Male</td>
</tr>
<tr>
<td></td>
<td>Female</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q4</th>
<th>Marital Status:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Single</td>
</tr>
<tr>
<td></td>
<td>Married</td>
</tr>
<tr>
<td></td>
<td>Other</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q5</th>
<th>If other, what is your status?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Answer:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q6</th>
<th>Are you currently enrolled as a student?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q7</th>
<th>If yes, in what level of education are you currently enrolled?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>High School</td>
</tr>
<tr>
<td></td>
<td>College Degree</td>
</tr>
<tr>
<td></td>
<td>Bachelor's Degree</td>
</tr>
<tr>
<td></td>
<td>Master's Degree</td>
</tr>
<tr>
<td></td>
<td>Doctoral Degree</td>
</tr>
<tr>
<td></td>
<td>Other</td>
</tr>
<tr>
<td>Question</td>
<td>Text</td>
</tr>
<tr>
<td>----------</td>
<td>------</td>
</tr>
<tr>
<td>Q8</td>
<td>If other, please specify.</td>
</tr>
<tr>
<td>Q9</td>
<td>Highest Completed Level of Education:</td>
</tr>
<tr>
<td></td>
<td>High School</td>
</tr>
<tr>
<td></td>
<td>College Degree</td>
</tr>
<tr>
<td></td>
<td>Bachelor's Degree</td>
</tr>
<tr>
<td></td>
<td>Master's Degree</td>
</tr>
<tr>
<td></td>
<td>Doctoral Degree</td>
</tr>
<tr>
<td></td>
<td>Other</td>
</tr>
<tr>
<td>Q10</td>
<td>If other, please specify</td>
</tr>
<tr>
<td>Q11</td>
<td>Total number of years of voluntary membership in organizations</td>
</tr>
<tr>
<td>Q12</td>
<td>Number of years of voluntary membership within the following</td>
</tr>
<tr>
<td>Q13</td>
<td>Have you ever held a leadership role (e.g., ministry leader, project leader, program leader, manager) in any organization (e.g workplace, another voluntary organization, church, school, etc.)?</td>
</tr>
<tr>
<td>Question</td>
<td>Text</td>
</tr>
<tr>
<td>----------</td>
<td>------</td>
</tr>
<tr>
<td>Q14</td>
<td>If yes, what were your roles?</td>
</tr>
<tr>
<td>Q15</td>
<td>For which of the following ministries have you held a leadership role</td>
</tr>
<tr>
<td>Q16</td>
<td>If you served as a leader in at least one of the above ministries, please specify your leadership roles</td>
</tr>
<tr>
<td>Q17</td>
<td>Citizenship:</td>
</tr>
<tr>
<td>Q18</td>
<td>Ethnic Background:</td>
</tr>
<tr>
<td>Q19</td>
<td>Profession:</td>
</tr>
<tr>
<td>Q20</td>
<td>Religion:</td>
</tr>
</tbody>
</table>
### Part II

**Q21.** For the following statements, imagine that you are supervising your mentee, as his or her leader on a project. Please indicate your level of agreement with the following statements, where 1 = Strongly Disagree and 7 = Strongly Agree:

<table>
<thead>
<tr>
<th>Statement</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>Don’t Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like my follower very much as a person.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My follower is the kind of person I would like to have as a friend.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My follower is a lot of fun to work with.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My follower defends my work actions to a superior, even without complete knowledge of the issue in question.</td>
<td></td>
<td></td>
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Q23. Do you have any comments about the questionnaire?

Submit

Close
Mentee Pre-Implementation Questionnaire

**Mentee Questionnaire I**

Thank you for participating in the Catholic Leadership Mentoring Program. Please fill out the following survey. Please make sure to complete all three sections of this survey. It should only take 5 to 10 minutes to complete. Thanks, Sheryl Guloy

### Part I

Please answer the following questions.

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<th>Q1</th>
<th>Name:</th>
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<td>Answer: *</td>
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<tr>
<th>Q2</th>
<th>Age:</th>
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<td></td>
<td>Answer: *</td>
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</table>

<table>
<thead>
<tr>
<th>Q3</th>
<th>Sex:</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Male</td>
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<tr>
<td></td>
<td>Female</td>
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<table>
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<tr>
<th>Q4</th>
<th>Marital Status:</th>
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<td>Single</td>
</tr>
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<td></td>
<td>Married</td>
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<td></td>
<td>Other</td>
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</tbody>
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<thead>
<tr>
<th>Q5</th>
<th>If other, what is your status?</th>
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<td></td>
<td>Answer:</td>
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</tbody>
</table>

<table>
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<tr>
<th>Q6</th>
<th>Are you currently enrolled as a student?</th>
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<td>Yes</td>
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<td></td>
<td>No</td>
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</table>

<table>
<thead>
<tr>
<th>Q7</th>
<th>If yes, in what level of education are you currently enrolled?</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>High School</td>
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<td></td>
<td>College Degree</td>
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<td>Bachelor's Degree</td>
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<td>Master's Degree</td>
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<td></td>
<td>Doctoral Degree</td>
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<td>Other</td>
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<tr>
<td>Q8.</td>
<td>If other, please specify.</td>
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<td>Answer:</td>
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<tr>
<th>Q9.</th>
<th>Highest Completed Level of Education:</th>
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<td>Other</td>
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<tr>
<th>Q10.</th>
<th>If other, please specify</th>
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<td>Answer:</td>
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<table>
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<tr>
<th>Q11.</th>
<th>Total number of years of voluntary membership in organizations</th>
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<td></td>
<td>Answer:</td>
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<table>
<thead>
<tr>
<th>Q12.</th>
<th>Number of years of voluntary membership within the following:</th>
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<tr>
<th>Q13.</th>
<th>Have you ever held a leadership role (e.g., ministry leader, project leader, program leader, manager) in any organization (e.g. workplace, another voluntary organization, church, school, etc.)?</th>
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<td></td>
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Q14. If yes, what were your roles?

Q15. For which of the following ministries have you held a leadership role:

Q16. If you served as a leader in at least one of the above ministries, please specify your leadership roles:

Q17. Citizenship:

   Answer:

Q18. Ethnic Background:

   Answer:

Q19. Profession:

   Answer:

Q20. Religion:

   Answer:
Part II

Q21. For the following statements, imagine that your mentor (within this mentoring program) is supervising you on a project. Please indicate your level of agreement with the following statements, where 1 = Strongly Disagree and 7 = Strongly Agree:

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### Q23. Do you have any comments about the questionnaire?

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Mentor Re-Match Questionnaire

Mentor 1.5 Survey

Mentor Questionnaire 1.5

Thank you for participating in the Catholic Leadership Mentoring Program. Please fill out the following survey. Please make sure to complete all three sections of this survey. It should only take 5 minutes to complete. Thanks, Sheryl Guloy

Part I

Please answer the following questions.

Q1. Name:
   Answer:*

Q2. Age:
   Answer:*

Q3. Have you ever held a leadership role (e.g., ministry leader, project leader, program leader, manager) in any organization (e.g. workplace, another voluntary organization, church, school, etc.)?
   - Yes
   - No

Q4. If yes, what were your roles?
   

Q5. For which of the following ministries have you held a leadership role?
   
   - [ ] Ministry of Education
   - [ ] Ministry of Health
   - [ ] Ministry of Social Services
   - [ ] Ministry of Environment
   - [ ] Ministry of Culture
Q6. If you served as a leader in at least one of the above ministries, please specify your leadership roles:

Q7. Profession:

Part II

Q8. For the following statements, imagine that you are supervising your mentee, as his or her leader on a project. Please indicate your level of agreement with the following statements, where 1 = Strongly Disagree and 7 = Strongly Agree:

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**Q9.** Please indicate your level of agreement with the following statements, where 1 = Strongly Disagree and 7 = Strongly Agree

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<td>I like working with technology.</td>
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</table>

**Q10.** Do you have any comments about the questionnaire?
Mentee Re-Match Questionnaire

Mentee 1.5 Survey

Thank you for participating in the Catholic Leadership Mentoring Program. Please fill out the following survey. It should only take 5 minutes to complete. Thanks, Sheryl Guloy

Part I

Please answer the following questions.

Q1. Name:
   Answer: [ ]

Q2. Age:
   Answer: [ ]

Q3. Have you ever held a leadership role (e.g., ministry leader, project leader, program leader, manager) in any organization (e.g., workplace, another voluntary organization, church, school, etc.)?
   - [ ] Yes
   - [ ] No

Q4. If yes, what were your roles?

Q5. For which of the following ministries have you held a leadership role?

- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
Q6. If you served as a leader in at least one of the above ministries, please specify your leadership roles

Part II

Q7. For the following statements, imagine that your mentor (within this mentoring program) is supervising you on a project. Please indicate your level of agreement with the following statements, where 1 = Strongly Disagree and 7 = Strongly Agree:

<table>
<thead>
<tr>
<th>Statement</th>
<th>1</th>
<th>2</th>
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<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like my supervisor very much as a person.</td>
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<tr>
<td>My supervisor is the kind of person I would like to have as a friend.</td>
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<tr>
<td>My supervisor is a lot of fun to work with.</td>
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<td>I am willing to apply extra efforts, beyond those normally required, to meet my supervisor’s work goals.</td>
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<tr>
<td>I do not mind working my hardest for my supervisor.</td>
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<td>I am impressed with my supervisor’s knowledge of his/her job.</td>
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<td>I respect my supervisor’s knowledge of and competence on the job.</td>
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</tbody>
</table>
### Part III

**Q8. Please indicate your level of agreement with the following statements, where 1 = Strongly Disagree and 7 = Strongly Agree**

<table>
<thead>
<tr>
<th>Statement</th>
<th>1</th>
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</tr>
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<td>I would be open to assuming leadership roles in general.</td>
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<tr>
<td>I see myself as a leader in general.</td>
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<tr>
<td>Others view me as a leader in general.</td>
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<td>I feel prepared to assume a leadership role within this organization.</td>
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<td>I understand what it means to be a leader.</td>
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<tr>
<td>I understand what it means to be a Catholic leader.</td>
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**Q9. Do you have any comments about the questionnaire?**

[Blank field for comments]
Mentor Questionnaire II

Thank you for participating in the Catholic Leadership Mentoring Program. Please fill out the following survey. Make sure to complete all two sections of this survey. It should only take 5 to 10 minutes to complete. Thanks, Sheryl Guloy

Part I

Please answer the following questions.

Q1. Name:
   Answer:

Q2. Age:
   Answer:

Q3. For the following statements, imagine that you are supervising your mentee, as his or her leader on a project. Please indicate your level of agreement with the following statements, where 1 = Strongly Disagree and 7 = Strongly Agree:

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<td>I understand what it means to be a Catholic leader.</td>
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### Part II

**Q5. Please indicate your level of agreement with the following statements, where 1 = Strongly Disagree and 7 = Strongly Agree:**

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<th>4</th>
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<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>I enjoyed participating in this program. :</td>
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<tr>
<td>I found working with my mentee helped me understand more about myself as a leader. :</td>
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<tr>
<td>I was able to use Knowledge Forum for the things I wanted to accomplish. :</td>
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<tr>
<td>I was able to use Audio Researcher for the things I wanted to accomplish. :</td>
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<tr>
<td>I found the online discussions meaningful. :</td>
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<td>I found the audio material relevant. :</td>
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<tr>
<td>The audio material provided my mentee and me with useful things to discuss. :</td>
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<tr>
<td>I recommend that more members participate in a program like this one. :</td>
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</table>

**Q6. Do you have any comments about the questionnaire?**

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[Submit]

[Close]
Mentee Post-Implementation Questionnaire

**Mentee Questionnaire II**

Thank you for participating in the Catholic Leadership Mentoring Program. Please fill out the following survey. Please make sure to complete all two sections of this survey. It should only take 5 to 10 minutes to complete. Thanks, Sheryl Guloy

**Part I**

Please answer the following questions.

<table>
<thead>
<tr>
<th>Q1. Name:</th>
<th></th>
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<tbody>
<tr>
<td>Answer:</td>
<td>*</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Q2. Age:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Answer:</td>
<td>*</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q3. For the following statements, imagine that your mentor (within this mentoring program) is supervising you on a project. Please indicate your level of agreement with the following statements, where 1 = Strongly Disagree and 7 = Strongly Agree:</th>
<th>1</th>
<th>2</th>
<th>3</th>
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<th>5</th>
<th>6</th>
<th>7</th>
<th>Don’t Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like my supervisor very much as a person.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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</tr>
<tr>
<td>My supervisor is the kind of person I would like to have as a friend.</td>
<td>☐</td>
<td>☐</td>
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</tr>
<tr>
<td>My supervisor is a lot of fun to work with.</td>
<td>☐</td>
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<tr>
<td>My supervisor defends my work actions to a superior, even without complete knowledge of the issue in question.</td>
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<tr>
<td>My supervisor would come to my defense if I were attacked by others.</td>
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<tr>
<td>My supervisor would defend me to others in the organization if I made an honest mistake.</td>
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<tr>
<td>I do work for my supervisor that goes beyond what is specified in my job descriptions.</td>
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<tr>
<td>I am willing to apply extra efforts, beyond those normally required, to meet my supervisor’s work goals.</td>
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<tr>
<td>I do not mind working my hardest for my supervisor.</td>
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<tr>
<td>I am impressed with my supervisor’s knowledge of his/her job.</td>
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<tr>
<td>I respect my supervisor’s knowledge of and competence on the job.</td>
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<tr>
<td>I admire my supervisor’s professional skills.</td>
<td>☐</td>
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</table>
Q4. Please indicate your level of agreement with the following statements, where 1 = Strongly Disagree and 7 = Strongly Agree

<table>
<thead>
<tr>
<th>Statement</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would like to see more members become leaders within this organization.</td>
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<tr>
<td>I would be open to assuming leadership roles in general.</td>
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<tr>
<td>I see myself as a leader in general.</td>
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<tr>
<td>Others view me as a leader in general.</td>
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<tr>
<td>I would be open to assuming leadership roles within this organization.</td>
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<tr>
<td>I feel prepared to assume a leadership role within this organization.</td>
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<tr>
<td>I feel prepared to assume a leadership role in other aspects of my life.</td>
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<tr>
<td>I see myself as a leader in this organization.</td>
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<tr>
<td>Others view me as a leader within this organization.</td>
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<tr>
<td>I understand what it means to be a leader.</td>
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<tr>
<td>I understand what it means to be a Catholic leader.</td>
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<tr>
<td>I understand what it means to be a leader within this organization.</td>
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<tr>
<td>I am comfortable working with computers.</td>
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<tr>
<td>I am comfortable using technology.</td>
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<tr>
<td>I like working with technology.</td>
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</table>
### Q5. Please indicate your level of agreement with the following statements, where 1 = Strongly Disagree and 7 = Strongly Agree:

<table>
<thead>
<tr>
<th>Statement</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
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<th>6</th>
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</thead>
<tbody>
<tr>
<td>I enjoyed participating in this program.</td>
<td></td>
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<tr>
<td>I found working with my mentee helped me understand more about myself as a leader.</td>
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<tr>
<td>I was able to use Knowledge Forum for the things I wanted to accomplish.</td>
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<tr>
<td>I was able to use Audio Researcher for the things I wanted to accomplish.</td>
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<tr>
<td>I found the online discussions meaningful.</td>
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<tr>
<td>I found the audio material relevant.</td>
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<tr>
<td>The audio material provided my mentee and me with useful things to discuss.</td>
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<tr>
<td>I recommend that more members participate in a program like this one.</td>
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### Q6. Do you have any comments about the questionnaire?

Submit

Close
Appendix G.

Group Interview

The following document is included in this appendix:

  • Group Interview Protocol.

Group Interview Protocol

Interview Protocol:

Duration: (approximately 60 minutes)

1) How do you view (approach) mentoring?

2) In what ways do you believe technology can facilitate mentoring?

3) In what ways can the technology integration be better implemented to facilitate mentoring goals?

4) What is your perception of the design of the various program structures?

5) In what ways can this particular mentoring program be integrated better into your particular leadership initiatives?

6) In what ways can we better implement the program?
Appendix H.

Focus Group

The following document will be included in this appendix:

- Group Interview Protocol.

Focus Group Protocol

Members of the organization’s leadership who had influence on the selection criteria and implementation of the program will be invited to attend a focus group. The following issues will be discussed:

- Leadership Development Structures
- Perceptions about Virtual Mentoring Integration into Leadership Development Program
- Mentor and mentee Selection Criteria.

Duration: Approximately 90 minutes

Questions:

1) What leadership development programs do you currently have in place?
2) What goals do these programs serve?
3) In what ways could an online mentoring program benefit your leadership development programs?
4) What issues are important to discuss with regards to integrating an online program with the existing leadership development structure?
5) What challenges may exist when trying to integrate such a program within the existing leadership development structure?
6) How did you select the mentors for this project?
7) How did you select the mentees for this project?
8) How do you believe mentees who respond well to the leadership mentoring program be followed up?
Appendix I.

Frame Interview

The following frame interview was conducted and its report written by Fiona MacKellar. I have included my reflections on the frame interview and the research at the end of this section.

Frame Interview Report by Fiona MacKellar

Frame Interview Findings

This report was undertaken at the researcher’s request with the specific goal of identifying subjectivities that Sheryl brings to the research project and making them transparent to the reader. It also allows her to reflect and expand her thinking. This report is based on a 70 minute semi-structured interview that was audio recorded and subsequently selectively transcribed. A list of the specific questions posed is provided at the end.

The Researcher's Prior Experience with the Topic

Sheryl comes to this study with significant knowledge and prior experience with leadership as it is defined and practiced within a Catholic lay organization. Sheryl’s practical experience with leadership comes from having taken on a leadership role, for a number of years, in a Catholic youth organization when she was in her mid-20s. As she led first a youth organization and then transitioned to heading a second organization, Sheryl grappled firsthand with issues of leadership development and leadership succession:

---

1 so we started up that youth group and we had to teach ourselves how
2 to all=of= a=sudden lead. AND THEN NOT ONLY THAT to create a
3 leadership development program for these youth. And then we brought
4 in some other people … and we had to figure out … so now how … okay
5 you’re leading a youth group … but they want to start another
6 organization for people who are older, like our age, so then alright that
7 means we have to train these people … to take care of themselves …
8 find replacements for ourselves. And then .. start .. something … a=new
9 I guess you could say organization .. right?
As the literature review attached to her research proposal amply displays, Sheryl has augmented her personal, practical experience with layers of theoretical knowledge of this topic. Some of Sheryl’s prior theoretical knowledge was gained firsthand as a result of her magisterial research at Concordia University, but it is clear that Sheryl has a thorough knowledge of the conceptual and theoretical knowledge that has been amassed on this topic by a variety of different research communities.

**The Researcher's Connection To and Feelings About the Topic**

Sheryl is admittedly very close to her research topic, and to the setting in which she has chosen to explore it. It is clear that she has very strong feelings about both. Catholicism forms a part of Sheryl’s core identity. As Sheryl notes, Catholicism is simply part of who she is. As to leadership, Sheryl characterized her intimacy with the subject by noting that at a certain period in her life she was more focused on leadership in the organization she led than she was on her job.

| 10 | by the time I had done my Master's I had already... |
| 11 | experience working in community organizations by that time and trying uh |
| 12 | ... trying to .. uh .. FIND PEOPLE to take leadership as an at different |
| 13 | ages too so working from teenagers to people in their 30s right? ...
| 14 | um and it was difficult. .. because no one wanted the responsibility? .. |
| 15 | and I found myself actually putting more effort in this organization than |
| 16 | I did in my own career. you know what I mean? It became almost the |
| 17 | focus of my life |

Sheryl and her supervisory team are aware of both the benefits and the drawbacks stemming from this level of intimacy between a research and his/her research topic. It came up in the interview that in considering ways of dealing with this intimacy, alternate settings involving different groups and a different religious denomination were considered, but ultimately rejected. Sheryl provided a strong rationale as to why the setting of a Catholic lay organization was finally decided upon. There are two elements at play. The first involves the insider’s local knowledge of the culture and, in term of discourse and exchange, the vernacular and register used by the
theologues who will populate such a setting. The second element involves narrowing the topic to a setting involving a cohesive knowable and definable conception of leadership. That this conception of leadership be recognized and recognizable was very important to Sheryl in terms scope and scalability.

Intimacy of the kind that clearly exists between Sheryl and her research topic clearly has both tremendous advantages and potential drawbacks that become clearer when we add to the picture the mode in which this research is to be pursued – that of design-based research (DBR). Sheryl’s intimacy and experience are obviously essential in the preparatory or ‘design’ stage of design research, but Sheryl will need to be watchful in the implementation and evaluative stage(s) of the study as her closeness may necessitate additional measures to ensure the reliability of her findings—as her closeness may blind her to certain things or encourage her to draw connections that another may not. Further, Sheryl spoke of scalability and intimated the hope that the findings will generate ‘petite generalizations’ that may apply to organizations of other religious denominations and may even apply to secular non-profit organizations such as the SPCA.

Other Choices Affecting the Design Central to the Study

During the frame interview, time was devoted to better understanding how and why leader-member exchange theory came to be central to the study. Also probed during the frame interview were Sheryl’s decision to conduct the study in the computer mediated environment of a non-synchronous communication platform such as Knowledge Forum, and the use of Father Spitzer’s “Spirit of Catholic Leadership” program.

Leader-member exchange. Sheryl spoke at length about alternate theories that were considered and rejected in terms of finding a conceptual framework upon which to hang certain aspects of this study. Sheryl noted that leader-member exchange theory or LMX has evolved beyond its initial focus on the dyadic leadership relationship. Sheryl rejected other possible theories of leadership such as great man theory and situational theory because they were not as well matched to the issue at hand: a consideration of how to get people to take on ‘the mission’ of a Catholic lay organization.
What really made me choose LMX is because this theory found ... at least in the corporate environment ... that those relationships that were high quality ... meaning there was trust and this stuff ... it correlated with really good organizational outcomes or benefits for the organization ... uh ... meaning that if ... if I have ... let's say I'm a leader and I have a follower and we have a good relationship? at one point it stops being transactional? ... like the relationship ... you do something for me and I do something for you ... instead of being transactional that way ... it almost becomes transformational in the sense that ... that we in- ... our inter-relationship with each other begins to change ... and in so doing um we start to care about what we were both doing together and so then um the organization then has people who not only relate to each other but ... they do more for each other and they do more for the organization ... and the whole idea is that these dyadic relationships happen with a leader and uh a follower ... but a leader has more than one follower right? ... and at one point you have a cluster of people who are then all working together and now it's no longer just about dyadic relationships it's about the network that begins to develop.

It is clear that this framework was selected because of its ability to capture the essence of leadership as practiced in organizations interested in engendering a strong, transformational exchange between leaders and followers.

**Knowledge Forum.** The frame interview probed Sheryl's previous experience with computer supported learning environments and her rationale for conducting her research in such an environment. Before beginning doctoral studies and fully fleshing out her research agenda, Sheryl's initial thoughts had been to use some kind of computer mediated means to support the building of social capital in a Catholic lay organization. Sheryl's early design plans did not involve studying leader-member exchanges at a distance. It was revealed during the interview that this choice to shift from studying leaders and members in a face-to-face exchange to hosting the exchanges in a computer mediated environment was partly influenced the work of her supervisor on mentoring at a distance, work that Sheryl's participated in before sitting down to plan out this study. In reflecting on what Knowledge Forum brought to the
study, Sheryl mentioned a number of affordances including accessibility and a sense of conquering issues of time challenges (in that asynchronous communication allows contributions to be made when it suits an individual), as well as conquering space (as organizations often face the problem of there being no one in proximity to rely on).

Not discussed during the interview was the question of ecological validity. Sheryl may wish to consider defending the ecological validity of taking Catholic leadership ‘out of the wild’ and introducing it in to an online environment not natural to the organization itself. While pragmatism is certainly at play here in terms of locating a means of capturing and ‘seeing’ these exchanges – reflection is perhaps called for into if and how the form or the medium may influence the content in terms of the nature and content of the interactions.

**Father Spitzer’s leadership materials.** The frame interview also sought to better understand why these particular materials became central to the intervention and design portion of the study. The discovery of these materials was a serendipitous one. As she investigated both Father Spitzer and the book he published, along with “Spirit of Catholic Leadership” series of televised talks about issues surrounding Catholic leadership, Sheryl was struck with how well this series aligned with her study and the intervention she had been designing. Sheryl herself is aware that she is not a theologian, while Father Spitzer clearly is. Further, Father Spitzer is known in the Catholic community and his recognition and expertise lends the intervention a measure of legitimacy.

**Expected Outcomes**

Sheryl was not immediately able to articulate any expected outcomes for the study. After further discussion and some probing, it became clear that Sheryl’s expected outcomes for the study took the shape of general hopes and desires for increased knowledge and understanding. The frame interview did not reveal any sense of Sheryl being consciously aware of any specific outcomes she hoped to see. The study, Sheryl noted, is meant to be exploratory, and she hopes it will reveal factors that are important in promoting successful leader-member exchanges. Sheryl is also interested in what may be revealed in the discussions stemming from the audio material drawn from “The
Spirit of Catholic Leadership” both in terms of participants’ sharing and reflecting upon their own leadership, and discussing leadership concerns within their own organization. The intent of the design was to provide features intended to promote deep, focused discussion. Broadly speaking, Sheryl is looking for clues as to what might encourage others to step up and take on leadership role – or as she often glosses it – to ‘own the mission.’

**Potential Self-Interest**

While any researcher may stand to benefit professionally from a study s/her undertakes, during the frame interview Sheryl did not belie any measure of expectation regarding how the study might benefit her directly or indirectly. Instead, what became clear during the interview was that Sheryl’s interest in pursuing this study comes more from a place of philanthropic interest. As Sheryl spoke at length about her goals for the study, and her hopes for our better understanding of the issues surrounding leadership in general, as well as her hopes with respect to better understanding leadership in Catholic organizations, it became clear that the benefits that Sheryl most hopes to see realized might be cast as a kind of social mission – exploring answers to the question of how you get people to ‘own the mission.’ Laudable though this undoubtedly is, it remains a potential source of bias that Sheryl may need to take measures to prevent from unduly steering the evaluative portion of the research.

**Frame Interview Questions Asked**

Q1: Can you tell me how leadership development became a significant research interest for you?

Q2: There are all kinds of voluntary and non-profit organizations, both religious and secular in nature, all of whom are no doubt grappling with leadership development issues – how and why is Catholic leadership important – both in terms of your thesis and in the world at large?

Q3: Can you speak to how and why the Father Spitzer materials became central to the design?

Q4: Can you speak a bit about how you selected leader-member exchange theory and how and why it resonates with your work?

Q5: What was your experience with virtual or telementoring prior to beginning this research? Also can you speak to how you came to choose to study leadership exchanges taking place in a virtual environment such as Knowledge Forum? Finally,
what do you see as the affordances and constraints of leadership exchange in such an environment?

Q6: How do you think your doctoral research might contribute to any future research in this area—either your own or someone else’s?

Q7: Design research often has very practical goals and expected outcomes – what outcomes do you begin this research expecting to see?

Q8: Do you have any either general or specific hopes as to what your research findings might be and what those findings might possibly accomplish in the world?

Frame Interview Reflections by Sheryl Guloy

I found the frame interview useful in helping understand my subjectivities. Most of all, it reminded me about my motivations for conducting this research and about decisions made in reference to this study. This interview was conducted after data collection had been completed but during the analysis and writing of the thesis report. While I do not present, here, all of my reflections, I do present to you those relevant to the findings of the frame interview. These findings are as follows:

• Part of the design of the study was aimed at establishing whether the assumption could be made that high-quality relationships within an online mentoring environment could be developed. This became one of my research questions and, over the course of the research, it became part of the central phenomenon studied.

• Though I hoped to see reflection and the development of relationships, I did not know whether these would develop or in what ways these would come to be. I tried to balance my optimism that these could be afforded by placing my faith in the research process, meaning that by seeking answers to my research questions and by asking the participants about their experiences, insights into these issues could be gained. In addition, I sought confirming and disconfirming evidence through the examination of various data collected, such as interviews and the notes written by participants. As much as possible, I have decided to include as much detail as can be appropriately included in this thesis to help the audience gauge, for itself, whether such reflection and relationships have been afforded by the design of this environment and that my findings, in fact, are trustworthy.

• My master’s thesis, “Owning the mission: Three volunteer experiences in an RNGO”, influenced the direction of my research and the design of this study. “Owning the mission” was the central theme that formed the basis of a developing grounded theory. It was this thesis that initially directed my literature review and conceptualization of this doctoral research study.

• I felt strongly that this doctoral research study should contribute to theory and practice. The frame interview reminded me of the importance of these two kinds of contributions. Further, the informal discussion with Fiona, after this interview, and my own reflections made me examine the degree to which this study was able to forward these two research goals. I did not only want to
develop a program, but I wanted to lay the foundation for understanding mentoring relationship formation and leadership development. I found that the degree to which I was able to contribute to one or the other of these goals influenced the tone of my writing, especially when I did not believe that I had contributed to their development as much as I would have liked. When revising my chapters, I noticed my supervisor’s comments about the tone of some of my writing and adjusted it accordingly. Research is a process and this dissertation is but the beginning of contributions I may yet contribute in the future. Hopefully, others will also see the importance of this research and build upon this initial study.