Canadian Journal of Career Development/Revue canadienne de développement de carrière

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Tous les articles acceptés pour publication doivent être présentés sur disquette. Pour de plus amples informations, veuillex communiquer avec le directeur des services de rédaction.

Adresser les manuscrits au rédacteur en chef:

Front Cover Art Design created by David Merkuratsuk. David is a post secondary student in his 2nd year of a 4 year degree in Folklore at Memorial University of Newfoundland. David is from Nain, Labrador and remembers his love of art going back to grade 2.

The Inukshuk... *"These magnificent Stone Cairns show that you should always have hope in where to go because they are the leaders that lead the way to safety which brings food, shelter, and life. All the years that I have been traveling through the barrens, I have always been amazed how these Inukshuks can bring you to your destination and they ask nothing in return."*

CONTENTS

Editorial

Inside the covers of this volume you will find articles on Employees' Perceptions of Repatriation by Susan MacDonald and Nancy Arthur; Mentoring and the World of Work: A Reference Model/Le mentorat et le monde du travail: un modéle de référence by Christine Cuerrier; Using Portfolios to Direct Workplace Learning by John Stewart; and an article by Tracy Morgan and David Ness entitled Career Decision-Making Difficulties of First-Year University Students. Each of these articles provides a significant contribution to the field.

We have continued our section on a conversation with a leader in the field. In this volume we have included a conversation with Stu Conger. Stu's comments and reflections are both challenging and insightful. I hope his conversation with me will cause you to sit back and think about the future of our work and profession.

With the release of Volume 2, Number 1, we are already planning a second issue for the upcoming year. We have received a number of international submissions and will profile some of these peer-reviewed articles in a special international issue in July 2003. We hope to continue the practice of publishing a special issue on a different topic each year.

Finally, I would like to thank the peer reviewers who give of their time to review articles and provide constructive feedback and guidance to individual authors. Your dedication has been appreciated.

A special thank you to The Counselling Foundation of Canada, Memorial University of Newfoundland, and Contact Point who have continued to provide moral and financial support for this issue, and the upcoming special issue to be published in July 2003.

Finally, a call to the profession. We would like to include a special section in future volumes on Canadian and International best practices. This may take the form of work you are currently engaged in. I believe that through the medium of this journal we can begin to share the practices that work well for us and may be of support to others in the field.

Enjoy!

Rob

Robert Shea
Founding Editor

Employees' Perceptions of Repatriation

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Abstract

This study explored the repatriation experience and adjustment strategies of employees returning to Canada. Two research questions were posed: 1) What has been your experience with repatriation? and, 2) What strategies have you used to cope with repatriation issues? Questionnaires and semi-structured interviews were utilized to gather information, and interview data was analyzed through the use of qualitative interpretation. Three metathemes emerged from this analysis, including work adjustment, lifestyle adjustment, and psychological adjustment. These results are discussed, including the thematic descriptions, and exemplars are provided from participants. Recommendations and coping strategies for effective repatriation adjustment are also reviewed.

Employees' Perceptions of Repatriation

There is an abundance of literature surrounding the dynamics of adjustment to foreign cultures, however, there is little recognition of reentry difficulties faced by employees returning home (Black, Gregersen, & Mendenhall, 1992b). Repatriation is the least carefully considered phase of global assignments, both in research and in organizational practices. Findings indicate that repatriation adjustment is often more difficult than the stage of cross-cultural transition; and a majority of repatriated employees are dissatisfied with the repatriation process (Adler, 1981, 1991; Black & Gregersen, 1998, 1999b; Black et al., 1992b). Investigations of cross-cultural transition and the process of repatriation must keep pace with growing demands for an international workforce (Arthur, 2001).

This article summarizes a study that explored the repatriation experience and adjustment strategies of employees returning to Canada. The study posed two research questions: 1) What has been your experience with repatriation? and, 2) What strategies have you used to cope with repatriation issues? The article begins with a review of the literature, including the importance of effective repatriation practice and previous studies of repatriation. Second, methods are examined, including rationale for a qualitative approach, a description of the participants, and how the data was analyzed. Third, results are discussed, including the thematic descriptions, and exemplars are provided from participants. The discussion then turns to conclusions drawn from this research, recommendations of strategies for repatriates, strengths and limitations of the study, and ideas for future research.

The Importance of Effective Repatriation

Inadequate repatriation practice represents a significant human resource management problem and a potentially large obstacle to successful globalization. Poor repatriation practice is costly (Black et al., 1992b), restricts the effective utilization of employees (Adler, 1991), often leads to the loss of valued personnel (Black & Gregersen, 1991), and is likely the main reason for employee reluctance to work abroad (Harvey, 1982, 1989, Spring). Repatriation problems often send the message to employees that global assignments negatively affect one's career (Black, Gregersen, & Mendenhall, 1992a). A poor repatriation reputation makes it difficult to recruit high caliber employees for foreign postings, which in turn increases the likelihood of problems throughout the expatriation-repatriation cycle.

The lack of repatriation programs and the insufficient value placed on international assignments (Black, 1991) leads to poor repatriation adjustment, dissatisfaction, and turnover (Black et al., 1992b). An average of one quarter of repatriates leave their company and join a competitor within one year of returning home, which is double that of managers who do not go abroad (Black & Gregersen, 1999a, 1999b). These turnover rates signify lost investment for corporations. Foreign assignments last an average of two to five years, and expatriate packages including benefits amount to expenditures ranging from $300,000 to one million dollars U.S. annually (Black & Gregersen, 1999a). Firms with hundreds of international employees and without repatriation programs may be losing hundreds of millions of dollars each year (Black & Mendenhall, 1989). Repatriation failure means that companies lose a large development investment, a high potential employee (Allen, 1998), and considerable knowledge leaves with an individual who understands both corporate headquarters and the overseas subsidiaries (Stroh, Gregersen, & Black, 1998).

Multinational corporations are far more effective at preparing expatriates for entry into another country than they are at providing reentry assistance for repatriates coming home (Harvey, 1982, 1989, Spring). Windham International (1998) found that 70% of firms provide some form of cross-cultural preparation. Unfortunately little attention is given to the repatriation process, as less than 15% of North American repatriates receive any sort of repatriation training (Black & Gregersen, 1999b). Engen (1995) estimates 90% of corporations offer less than three hours of training for the return home, suggesting corporations have yet to understand the importance of effective repatriation

practice. A meta-analysis of cross-cultural training for expatriates found programs to be effective in helping expatriates adapt to their foreign postings (Deshpande, 1992), yet there appears to be little perceived need for repatriation programs. Human resource personnel often find it inconceivable that returning expatriates need to readjust to anything when coming home. In reality, the majority of expatriates find repatriation to be tumultuous, both personally and professionally (Black & Gregersen, 1999b).

Models That Guided This Research

Most empirical research on the subject of repatriation adjustment has lacked theoretical grounding (Black & Mendenhall, 1990, 1991). Researchers believe the key theoretical mechanism related to repatriation adjustment is uncertainty reduction: Factors that reduce uncertainty will assist adjustment, while factors creating uncertainty will impede adjustment (Black, 1994). In conducting this study the following four models of reentry and adjustment were considered.

First, Berry's (1997) model of acculturation highlights factors affecting repatriation adjustment and possible outcomes of returning home. This model suggests that reentry affects many life roles and that repatriates have tremendous control over their adjustment process. Second, Adler's (1981; 1991) model of coping with reentry focuses on adjustment to work and highlights the impact corporations have on repatriation adjustment. This model acknowledges the influence of both individual and corporate attitudes. Third, Black's (1988) model of work role adjustment illuminates repatriation as affecting all life roles. The degree of adjustment will depend on the amount of change involved when repatriating, and this transition can be highly individual. This model proposes adjustment and knowledge are interrelated, whereby the greater the knowledge of each area of the repatriation process, the greater the degree of adjustment. Fourth, Black, Gregersen and Mendenhall's theory of repatriation adjustment (1992b) emphasizes the need to treat repatriation as a complex process, involving distinct but interre-

lated variables. This model highlights communication, information and expectations as playing important roles in repatriation adjustment.

Although space is prohibitive for a comprehensive review of these models, four overriding principles become apparent: 1) Repatriation is a multifaceted phenomenon, affecting all life roles; 2) there are a multitude of variables that affect repatriation adjustment; 3) individuals and corporations have a synergistic effect on repatriation outcome; and, 4) communication, knowledge, expectations, and adjustment are interrelated during the process and outcomes of repatriation. These principles must be taken into consideration to direct the nature of inquiry into repatriation.

Empirical investigations of repatriation have predominantly sampled American executives and managers (Black, 1991, 1992; Hammer, Hart, & Rogan, 1998; Harvey, 1989), there have been a small number of studies of Finnish (Gregersen & Stroh, 1997) and Japanese repatriates (Black, 1994; Gregersen & Black, 1996), and one study sampling repatriates from 26 different countries (Feldman, Tompson, & Holly, 1993). This research has primarily highlighted repatriation problems, rather than repatriation solutions. Data has been gathered through the use of questionnaires, with the exception of two studies utilizing semistructured interviews (e.g.Adler, 1981; Briody & Baba, 1991). Questionnaires have generally been analyzed through regression and factor analyses to discover relationships between repatriation variables and adjustment, while interview methods have generally been supported by phenomenological approaches and searching for common patterns. Most research to-date has elaborated upon the demands encountered during repatriation but stops short of elaborating upon the strategies used by repatriates during the process of returning to their home environment.

Methodology

Although eclecticism has been criticized as being ad hoc, this ideology allows for choosing the most appropriate aspects of compatible methodology and analysis that fit our beliefs, the pur-

pose of the study, and the phenomenon of repatriation. This study was guided by methodology that would uncover critical processes as participants experienced repatriation demands and developed strategies for coping with the reentry transition. Ideas from hermeneutics and phenomenology informed the methodology. Hermeneutics has been referred to as the "art of understanding" (Gadamer, 1985, p.146). This study adopts the Heideggerian assumption that all knowledge is based on preunderstanding and interpretation. Rather than viewing prior knowledge about repatriation as a barrier, it is viewed as an integral part of gaining new understanding. When a researcher's assumptions about a topic are brought into the research, they are "at risk" (Gadamer, 1985) to be confirmed or disconfirmed. This research also utilizes a number of concepts from phenomenological psychology. Phenomenological studies examine detailed accounts of people's "lived experiences" (Klein & Westcott, 1994) and examine patterns and relationships of meaning.

An open-ended questionnaire was used to collect demographic information and to prompt participants to begin thinking about their repatriation experience. Semi-structured interviews were utilized to gather information, and interview data was analyzed through the use of qualitative interpretation.

Participants

Selection criteria for participants were employees who had worked overseas for a minimum of one year and who had repatriated to Canada for one year or less. This population was targeted because a minimum one year allows for a sufficient degree of immersion into the host culture, and the first year after repatriation appears to be the time frame when most readjustment occurs (Adler, 1981; Black & Gregersen, 1991, 1999b).

All participants in this study are White Caucasians including seven men and one woman ranging in age from 35 to 48 years. The length of their foreign postings extended from 3 to 23 years, and six participants had completed multiple international assignments. The mean length of time working as expatriates is 8.9 years. The participants had

been repatriated between 4 months and 1 year, averaging 8 months back in Canada. The positions held by these individuals while working internationally include occupations in the areas of finance, management, oil and gas exploration, drafting, and education development. The participants lived and worked in many countries including Algeria, Australia, Brazil, Columbia, Ecuador, England, France, Indonesia, Italy, the Netherlands, Norway, Oman, Peru, Russia, Saudi Arabia, Scotland, Venezuela, and the United States.

Data Analysis

The goal of data analysis was to obtain a valid and common understanding of the transcriptions (Kvale, 1996), and to find the invariant structures of the experience of repatriation (Dukes, 1984; van Manen, 1990). This may also be referred to as the "essence" of the experience, which is the nature of the phenomenon of repatriation. Data analysis proceeded through the use of thematic procedures to identify meaning structures. After the first interview, transcripts were reviewed for themes and meanings and were clustered and recorded. Each participant was given a copy of his/her transcript and a summary for verification and clarification during the second interview. Any new information resulting from the second interview was synthesized with the original data, and the meaning structures and themes were further refined. Each participant reviewed a final draft of themes and meanings to ensure the accuracy of interpretations.

The process of identification and interpretation of themes included two types of analyses. The first was a "within" person analysis which considered the themes and meaning clusters for each person, and this was followed by an "across" persons analysis, which looked for shared themes among the participants. The phenomena were intuitively grouped according to similarities for each person and for the group as a whole (Giorgi, 1985; Kvale, 1996). A respiralling technique was used to identify patterns of meaning to allow for both contrasting and comparison of these themes (Klein & Westcott, 1994). Two types of experiences are also identified. The first are those that appear

close to the surface, are consciously acknowledged by the repatriate, and easily identifiable. The second type is the prereflective experience, which is not readily noticeable, and is that which is experienced but not articulated (Osbourne, 1994). Reaching the prereflective experience involved a great deal of introspection, internal observation, and going beyond the surface characteristics of the text. The researchers' previous knowledge of repatriation and their psychological training supported this process of analysis. Simultaneously, bracketing (Dukes, 1984) was practiced in order to acknowledge and set aside personal assumptions and to focus on the experience of repatriation offered by participants.

Results

Three metathemes emerged from this analysis including work adjustment, lifestyle adjustment, and psychological adjustment. Table One provides a summary listing of the three major themes and related subthemes acquired from the data.

TABLE 1

Summary of Repatriation Adjustment Themes

Theme One: Work Adjustment
    Job Responsibilities: Career
    Development - Professional Status
    Loss
    Colleagues
    Organization

Theme Two: Lifestyle Adjustment
    A New Lifestyle
    Activities
    Relationships
    Financial Adjustment
    Freedom
    Adjustment to Canadian Society
    and Culture

Theme Three: Psychological Adjustment
    Choice
    Expectations
    Perception of Loss
    Strategies
    Positive Experiences, Learning
    Outcomes and Opportunities

Work Adjustment

Work adjustment was one of the salient metathemes, as six participants were embarking on a new job within their home country organizations and two were beginning new jobs with different companies. Work adjustment can be illustrated by the three themes: 1) job responsibilities, 2) colleagues, and, 3) the organization.

Job responsibilities. Repatriates who were most satisfied with their current job had returned to responsibilities similar to the job held internationally. Unfortunately, for most employees, this was not the case, as there was a tendency to return from a managerial position to be placed in a nonmanagerial job. The sense of dissatisfaction for most employees returning to Canada is described in the following exemplars.

> "I had a staff of 15 over in Algiers. I have a staff of zero here....Right now where my career is, I couldn't sabotage it much more."
> "I'm probably not going to stay here very long....if I can find something else tomorrow, I'd go."
> "It was frustrating dealing with people making decisions about overseas operations when they had no such experience and were not willing to listen to those who did."

Work and colleagues. The main theme regarding colleagues was described as "my network has been completely destroyed" due to turnover rates, organizational changes, and losing contact with people. This left people feeling out of touch upon their return home.

> "There was a fair amount of attrition at work, there was the takeover at work. I've been overseas twice, both people I reported to when I left were gone by the time I returned....This resulted in a lot of new individuals I did not know and an organization structure I was not familiar with."

Work and the organization. None of the companies associated with the repatriates in this study had a formal repatriation plan. Employees who were most satisfied with their jobs upon returning to Canada were also more satisfied with how the organization han-

dled their repatriation.

> "The company didn't do anything with repatriation to help us adjust back."
>
> "If I had been given some sort of debriefing counseling, it would have been easier to adjust."

These examples suggest that the process of repatriation brings forward the relationship between employees and the organization. Most participants felt that their international experience was not beneficial to their career development. However, they rationalized that any disadvantages imposed upon their careers were offset by the personal gains of living and working internationally. The personal aspect of reentry adjustment was also addressed in this study and also appears to be a major component in the experience of repatriation. This next section reviews findings regarding lifestyle and related subthemes.

Lifestyle Adjustment

Each participant found that repatriation includes adjusting to a different lifestyle compared to the one they had become accustomed to during their international assignment. Although the foreign country lifestyle and the Canadian lifestyle varied for each participant, the common theme was that lifestyle had been altered. One repatriate described this as "my lifestyle changed dramatically, like night and day". Lifestyle revolved around five common subthemes: 1) Activities, 2) relationships, 3) finances, 4) freedom, and 5) Canadian culture and society.

Activities. Many repatriates defined their lifestyle through activities, and almost all repatriates found many activities changed due to repatriation. Those who were involved in enjoyable activities during their international assignment experienced a sense of lifestyle loss, while for the people who have returned to activities they longed for while overseas, there was a perception of gain. Examples of changes in activities include the following

> "We missed our (Canadian) lifestyle, and for us it's the mountains and skiing."
>
> "We always did something that was oriented toward Russian society or culture everyday,....So

(repatriation) was giving up a really rich culture we were immersed in."

Relationships. Activities also revolve around relationships. Returning to Canada meant the reestablishment of relationships with friends and family, starting new relationships, and the maintenance or relinquishing of relationships that were established during the international assignments.

> "We were breaking longterm ties. We had tears at our going away party at work. There were friends that thought they'd never see us again."
>
> "Reestablishing relationships has not been easy. Social groups that had been in place had changed or ended. Some of our friends had changed, situations changed, hence it is not the same."

Finances. Financial changes are part of the repatriation experience that affects lifestyle, as domestic pay is usually lower than international compensation packages, and is compounded by increased taxes. There are also many extraordinary costs incurred when returning to Canada, which often include the purchase of a home, vehicles, and clothing to better suit the environment.

> "The financial adjustment has been difficult. You have to change your spending habits...It's like taking a big cut in pay....it is hard to get used to paying the high taxes."
>
> "I guess the house was probably the largest outlay, and clothing for all the family members...we didn't own ski jackets."

Freedom. The term freedom surfaced in many interviews, as participants found they had greater freedom of choice regarding cultural, religious, and political affiliations, more occupational choice, greater diversity in activities, and more freedom with respect to health and safety.

> "Freedom of choice. No one says I can't wear shorts in public....I can feel safe with my wife on the streets....When our son goes to school, the freedom of being able to learn what he wants to learn and what the schools can teach."
>
> "There are no more language barriers, no more feeling somewhat uncomfortable in a strange socie-

ty...here the sky's the limit."

Canadian culture and society. As with freedom, adjustment to Canadian society and culture were often related to comparisons made to the countries of expatriation. There was a tendency to comment on the differences in technology and consumer lifestyle.

> "The (staff) at the counter hands me this (banking) machine to punch in my number and I said, "What's this for?" and she looked at me like I was from Mars. I didn't have a clue."
>
> "...going into stores and being so overwhelmed by the colours and choices that walking out felt like the only option."
>
> "I am not as materialistic as I used to be."

The consequence of losing enjoyable activities, especially an active social life and financial decreases seemed to create a sense of personal status loss for most repatriates. Losses relating to both work and lifestyle were the focal point of repatriation for these individuals. The next theme, psychological adjustment, is the area given the least amount of consideration by both repatriates and their corporations.

Psychological Adjustment

The interviews conducted with these participants presented repatriation as a process whereby aspects of psychological adjustment occur over time. This adjustment was influenced by the following themes: 1) Choice, 2) expectations, 3) perception of loss, 4) opportunities, and, 5) strategies. The following quotes describe these factors.

Choice and repatriation. Choice refers to the option of returning to Canada and the timing of that decision. Those participants who were in control of returning to Canada and the timing of their return seemed to adapt much easier, used more strategies, identified more opportunities, and were more flexible and positive in attitude.

> "We actually arranged our return....there was no pressure, no plans on the company's part to return us, but there was an opportunity in Canada...."
>
> "We weren't ready to come back, so coming back has been a significant adjustment...I probably carry a bit of resentment because of

that, and that probably might come out through the course of the interview."

Expectations and adjustment. Expectations had an enormous impact on repatriation satisfaction. When expectations were met or exceed, adjustment was a smooth transition. Expectations that were not met or were undermet (especially in the area of work) caused repatriation difficulty.

"We didn't expect a tough adjustment....And we knew there would be a lot of changes in everything here when we came back....We talked to people who had come back, so we sort of knew what to expect."

"I guess from a job point of view I came back here hoping I'd be comfortable with the way things were. But that hasn't turned out. I didn't expect that. I didn't think I'd come back here and want to quit. I expected to come back and be comfortable."

Perception about loss. Losses mentioned by the participants included less travel opportunities, loss of cultural experiences, loss of relationships, decreased personal and professional prestige, reduction in finances, and lifestyle loss. It became evident the greater the perception of loss, the more difficult repatriation issues became.

"(Repatriating) is a loss or sorrow that you get over in time."

"I can't come up with anything positive....I would say zero positive aspects from repatriating. Professionally....no, absolutely zero positives professionally. Zero."

Strategies and adjustment. This study demonstrated an association between strategies and adjustment, as it seemed that the more strategies used, the greater the adjustment. One of the most effective strategies seemed to be goal setting, accompanied by a plan of action, as goals allowed the process of repatriation to be a more purposeful endeavor.

"Planning minimizes the surprises when you come back, so there aren't the shocks. As long as you have a plan, you're maximizing the aspects you have control over."

A useful strategy for some was to

regard the move back to Canada as another foreign assignment. This is sound advice, as all repatriates have experience adapting to another country, and adjustment strategies used as expatriates could also be useful for their repatriation adaptation. Flexibility, a positive attitude, and patience were also frequently noted as important for adjustment.

"I think you have to treat (repatriation) as a foreign assignment. After being away 23 years and moving as much as I've moved, I consider my move back to Canada no different than any other foreign move."

"I think the key is to always have realistic expectations and to be able to roll with the punches."

"Patience....it's going to take some time to accomplish it all."

While journaling can be an effective of dealing with change, only one repatriate talked about taking the time to reflect through writing. This individual was also the only person who had the opportunity to attend a one-day repatriation seminar at the time of our interview.

"It makes a big difference being able to put it on paper or on a computer. It's like talking to somebody....It's helped me to go back and read it. Maybe because it helps you see how much you've changed and how much you've been through, and how that makes you a different person today."

"It made a big difference, it really did. It brought a lot of things together....It gives you that perspective so you can see how you've changed, what areas you've changed a lot in, what difference that will make in your life. I found it quite beneficial."

Some repatriates believed that finding a job with a new corporation would be beneficial upon returning to Canada. Others believed repatriation was only a temporary or part-time solution.

"I'd say this is only ever going to be a part-time solution unless in the next two to three years we get further settled in....we can chuck everything and go elsewhere....there's nothing holding us back."

Opportunities and repatriation. The ability to identify opportunities,

positive experiences and learning outcomes is also noted to be a helpful strategy for repatriation adjustment. When opportunities could be associated with repatriation, there seemed to be more positive repatriation adjustment.

"Repatriation allowed us to come back to the outdoor lifestyle we really enjoy. It has allowed us to appreciate driving our own vehicle, a restricted privilege overseas. Repatriation, because we each needed support, brought my wife and I closer together. My wife finds that it is the repatriation itself which makes us appreciate the experiences of having worked and lived overseas."

"Things are a lot more organized here. And things happen more easily, it's more efficient (here), and things are in the stores."

"This is a very child friendly society."

Inquiries aimed at the experience of psychological adjustment were more difficult for these repatriates to answer directly, compared to questions regarding work and lifestyle. However, adjustment is not simply determined by the work and lifestyle repatriates return to in Canada. Woven into the discussion were clear examples that repatriation adjustment is also dependent upon choice, expectations, perception, strategies, and identified opportunities. This suggests that the meaning of repatriation involves understanding the factors related to psychological adjustment. The conclusions drawn from this study, involving work, lifestyle, and psychological adjustment are discussed next.

Discussion

One of the main predictors of repatriation success for the employee is job placement upon reentry (Black & Gregersen, 1998; Black, Gregersen, Mendenhall, & Stroh, 1999), as overall satisfaction is strongly related to the impact of the foreign assignment on career goals. The influence of job placement on repatriation satisfaction was evident in this study. Employees who returned to positions that were similar to foreign postings, and those who could use their internationally acquired knowledge and skills, were more satisfied with the repatriation

process. Other work issues identified in the literature which were echoed by participants include loss of autonomy and authority, loss of career direction, and loss of recognition domestically (Adler, 1981). What came across strongly in this study were the feelings of frustration with the job, the organization, and the handling/mishandling of the repatriation process.

This research underscores a number of lifestyle adjustments when returning from abroad. Various losses cited by participants include loss of cultural and travel opportunities, loss of friendships, and financial losses. Due to Canada's high levels of taxation, it appears that financial losses are greater for Canadians than repatriates from other developed countries, e.g., United States. There are many similarities found in both the literature and the current study regarding lifestyle. Challenges adjusting to the general living environment including food, climate, transportation, and schools (Black et al., 1992a), a feeling of being left out and left behind (Piet-Pelon & Hornby, 1992), a feeling of alienation upon returning (Gomez-Mejia & Balkin, 1987), and forgetting how to deal with the country's pace (Thompson, 1992). As well, difficulties reestablishing relationships with friends and family were noted, as the bonds of common experience that once existed often have disintegrated (Engen, 1995). Although the focus of repatriation is often on the negative aspects of returning home, participants emphasized many lifestyle gains. These include greater freedoms, educational, and extracurricular opportunities for children, a return to activities not possible in foreign countries, and living in closer proximity to family members.

Adjustment includes psychological adaptation, which is the internal outcomes of personal achievement and satisfaction (Berry, 1997) of returning to life in Canada. The experience of participants in this study illustrates that psychological adjustment is at the core of repatriation. Psychological adjustment is affected by choice, expectations, perception of loss, strategies employed, and opportunities identified.

Choice and repatriation. Berry (1997) refers to choice as the degree of voluntariness, or whether the individual chooses to move as compared to the move being compulsory. Individuals with the ability to choose the timing of repatriation clearly expressed greater adjustment. This study adds to our understanding of voluntariness by demonstrating that those people who freely chose to repatriate and the timing of their return adapted much easier, used more strategies, identified more opportunities, and were more flexible and positive in attitude.

Expectations and adjustment. Black, Gregersen, and Mendenhall's (1992b) work found expectations play an important role in effective repatriation adjustment, and this was certainly confirmed by all participants in the current study. Repatriates who experienced disconfirmed expectations, or negative differences between expectations and realities (Arthur, 2000), acknowledged adjustment difficulties. Studies recommend that reducing uncertainty will help develop accurate expectations, which leads to better repatriation adjustment (Black et al., 1992a; Black, Gregersen, & Oddou, 1991). This appears as an important direction for repatriation, as the repatriates with more accurate expectations had a more effortless adjustment experience.

Strategies and adjustment. Literature on transitions has determined that effective coping means being flexible and utilizing a number of different coping strategies (Schlossberg, 1984). This finding was reflected in the findings of this study, as participants who reported they were adjusting positively were those who also reported using the most diverse strategies. There were also two strategies that emerged from the interviews that have not been previously cited in the literature. The first is goal setting and establishing a plan of action upon return. The second is finding a new job in another organization that corresponds with career aspirations. Participants' reports about the effectiveness of these strategies suggest the importance of career planning as part of the repatriation process. Planning and decision-making prior to re-entry and during the first year of repatriation appear as key directions to support international workers.

Perceptions about loss. The results of this study also emphasize the impact of perceived loss. As a general rule, it appeared that the greater the perception of loss, the greater the repatriation difficulties. It is interesting to note too, that those who seemed to have gained so much during their expatriation experience had the greatest perception of loss. While existing research addresses loss, it does not directly address the issue of perception of loss, which varied greatly for participants. The key to comprehending issues of loss is directly related to understanding the personal meaning associated with the perceived losses. This was accomplished in the interviews through listening to the repatriates' changes in worldview and expanded cultural awareness (Arthur, 1998), which may lead to difficulties when reintegrating back into Canadian culture.

Opportunities and repatriation. Adler's (1991) study determined repatriates who adjust well are those who recognize positive and negative changes in themselves, their organization, and their community. Participants in this study often found it difficult to identify positive aspects of repatriation, and tended to focus on losses. While all participants welcomed the chance to look for repatriation opportunities, the literature does not refer to opportunities or positive experiences of repatriating. This research identified opportunities of returning to life in Canada, which for some includes returning to a less polluted and less crowded environment, lower cost-of-living, better health care and education, a more efficient society, and better systems of transportation, to name a few examples.

Recommendations For Repatriates

The following recommendations are based upon the insights of participants shared during this study. Participants found these ideas to be useful from their personal experiences of repatriation and focuses on what helped them in their adjustment process.

Work adjustment. Existing literature recommends repatriates make active attempts to change the work environment and to seek out information (Adler, 1981, 1991). The advice repeated by participants in this study echo the need for workers to be self-

directed and take charge of their career development (Bridges, 1994). Participants offered the following suggestions:

1. Take the initiative regarding job placement and begin this process well in advance of returning. Update resumes prior to returning so managers understand the experience gained internationally.

2. Become informed by asking questions to develop an accurate understanding of what to expect professionally upon return. This includes becoming apprised of the firm's repatriation policies.

3. Recognize that returning may mean temporarily taking a step backward in one's career. To help alleviate this issue, keep current with technical skills, as managerial positions or jobs at a similar level or higher may not be available upon return.

4. While on assignment, maintain contact with colleagues or managers to remain familiar with organizational changes.

Lifestyle adjustment. Prepare for the return by gathering as much information as possible in the same way one would when going overseas. This concept was elaborated upon by participants with the following suggestions:

1. Develop goals and a plan of action.

2. Ask questions, and prepare for the return in advance of repatriating.

3. Formulate a financial plan to ease the fiscal shock and to prepare for the many extraordinary expenses of returning. Decisions such as retaining real estate in your home country during expatriation should be discussed with professional advisors such as lawyers, financial advisors, or accountants.

4. Become involved in the community and partake in pleasurable activities.

5. Socialize with other repatriates.

Psychological adjustment. The predominant theme in the literature regarding psychological adjustment is developing accurate expectations (Black & Gregersen, 1998; Black et al., 1992b), while psychological reappraisal or viewing the more positive side of a sit-

uation is also indicated. Participants gave the following recommendations:

1. View repatriation as a process that takes time to adjust.

2. Develop realistic expectations. Expectations can be modified through talking to other repatriates, reading, and gathering information about work and lifestyle issues.

3. Recognize you are a changed individual due to your expatriation experience.

4. Develop the attitudes of patience and flexibility.

One recommendation that covers all facets of adjustment is to supplement the strategies with a clear commitment to take charge of the repatriation process. The common thread that runs through these recommendations involves taking the initiative to determine the course of repatriation. It is empowering for individuals to make the transition of reentry a purposeful and meaningful endeavor by creating the future and determining one's destiny.

Conclusion

Repatriation is a profound cross-cultural transition that affects people across their life roles. This discussion has elaborated upon three core areas of repatriation adjustment, including work, lifestyle and psychological adjustment. While this research has helped clarify employees' perceptions of repatriation, there are several limitations that require acknowledgement. First, all participants except one worked for corporations that were related to the natural resources sector of our economy. One cannot help but wonder if a greater diversity of industries would have demonstrated any substantial differences in findings. Second, much of the data presented by the participants represents a retrospective account of the experience of repatriation. As well, all participants had been repatriated for varying amounts of time, ranging from four months to just over one year. This raises speculation that differing conclusions may have resulted if interviews of each participant had occurred throughout the process of repatriation. Third, due to the limited space of this article, the recommendations and implications for

repatriation programming within organizations have not been discussed. Although the focus of this article has been on the experience of individual employees, the roles and responsibilities of organizations to support their employees must also be examined.

Future research is needed that considers repatriation as an evolving process that deserves longitudinal investigations. Qualitative studies utilizing semi-structured interviews over the span of repatriation adjustment may provide an even greater perspective of the personal meaning of repatriation. Research is also lacking on the repatriation experience of family members. Results of this type of study may also add to the knowledge of repatriation and the repatriated employee, as the reciprocal effects of adjustment between family members may contribute to our understanding of this complex process. It appears the number of employees working internationally will continue to grow, and so must our understanding of the repatriation experience, and ways to support employees during their transition home.

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Mentoring and the World of Work: A Reference Model

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Mentoring, a Practice Becoming Organized

"To do mentoring" has become fashionable again. *Mentors* and *Telemacus* are repeating history; we observe in the early years of the 21st Century that the same basic characteristics of mentoring remain, a senior supporting and educating a protégé. Generally speaking, mentoring finds its roots in the life stages of learning protégés and experienced mentors. For protégés, mentoring is a time of new experiences or transitions with all the challenges they imply. For mentors, it is the time of mid-life and, in many cases, the career stage when they feel a need to bring to fruition their skills, expertise and worldviews for the benefit of the younger generation (Houde, 1995, p. 29).

We can therefore foster the meeting of these two complementary needs by structuring an activity that will bring together and facilitate the development of a relationship between an experienced person and a learning individual, most often with the purpose of professional development. This structure is called a **mentoring program** in the United States, Quebec, and the rest of Canada. Thus we can see that mentors are back in service, and no longer working alone.

Mentoring can be defined as a means of structured learning, according to Galbraith and Cohen (1995):

> Mentoring is an interactive person-to-person process that guides learning development, assuming the participants have qualitatively and quantitatively adequate contacts to allow for this development.

Mentoring in Quebec and Elsewhere

For nearly twenty years, mentoring has had a high profile in the United States, where writers have described the existence of many mentoring programs. These programs support disadvantaged young persons get into or stay in school, integrate young professionals in various fields, support young entrepreneurs as does the Service Corps of Retired Executives (SCORE), and human resources management programs in business settings. Listing the articles on these programs would be a research project in itself.

Canada's 1992 *"Stay-in-School"* initiative is one program that has highlighted mentoring as a significant volunteer activity in helping young persons at risk of dropping out of school. As well, Peer Resources reports on mentoring in Canadian businesses as well as in school and community settings. Mentoring practice in Canada has developed over the past fifteen years, closely following that in the United States in focusing on professional development, psychological, and social objectives. In 1996, the federal government Treasury Board produced *"Guidelines for Developing a Mentoring Program"*, a reference paper that has certainly inspired numerous mentoring programs in Canada and Quebec. More recently (January 2002), a group of persons involved in the development of mentoring across Canada organized the first national conference on mentoring, which brought together more than three hundred (300) persons from all parts of the country.

In Quebec, most mentoring experiences on record are barely ten years old. Here again, formal programs are developing in various educational, community, corporate and organizational settings, with professional development, psychological, and social objectives. Articles on mentoring programs have been published since 1990, many by research professors interested in organizational development (Lépine, Benabou, Guay), adult psychological and social development (Houde), and intergenerational relationships (Lefebvre). For example, the *Réseau des Femmes d'affaires du Québec*, UQAM, and the *Chambre de commerce de Montréal* have pioneered the organization of formal mentoring programs in the labour market, in the areas of entrepreneurship support and career development. Since 1995, several other groups have joined in, as they consider mentoring an effective way of developing and transmitting knowledge and experience while validating participants. Even *cybermentoring*, distinctively original, is finding its niche (Academos, Psybermentor, *uq@men-tor).*

In November 2001, a group of people in mentoring practice in Quebec organized a first conference that brought together practitioners in professional mentoring, with the purpose of exchanging ideas on the practices and to identifying needs. One of the recommendations that emerged from this event was an emphasis on the lack of proper tools and references for what should represent a quality mentoring activity. From that, stem the research mandate that we will now describe.

Our Research Project on Mentoring and the World of Work

The main objective of this research project is:

> **To create a promising model for developing mentoring in Quebec.**

For this purpose, we selected eighteen mentoring programs focused on career development and the labour market to constitute a sample that would be most representative of the Quebec situation. Community groups, educational groups, entrepreneurship support organizations, private sector businesses, and professional orders and associations operated these programs. We contacted the co-ordinators of these mentoring

programs and, using a questionnaire and interviews, asked them about their mentoring practices. We paid special attention to their assessment of the strengths, limitations, and effective mechanisms of their programs, and their perception of the effects of mentoring on their clients. This analysis highlighted the importance of set-up, operation, follow-up and evaluation in these mentoring programs and from these findings we developed a structural model that may be used as a framework for analysing existing programs or as a reference for introducing new ones. In light of our conclusions, we discuss issues in developing mentoring in Quebec, especially of a professional nature.

Our Basic Model

A number of researchers, particularly in the United States, have developed structured mentoring models, each one focusing on different aspects of the mentoring concept. For example, Murray (1991) has developed a generic model for introducing mentoring programs, describing their components and putting them in sequence over time. Elsewhere, in a managerial approach, Johnson (1997) has developed a strategic mentoring model in which the individual, the group, and the organization benefit in turn from strategies to facilitate *learning, leading* and *relating*.

We opted to base our research on the model suggested by Hunt and Michael (1983) of the University of Miami. These researchers present their model as a basis for research on the mentoring relationship that includes all aspects of context, characteristics of participating mentors and protégés, stages of development of the mentoring relationship, and impacts on mentors, protégés and the organization. In our view, this model comes closest to the aspects of program evaluation proposed by Carter McNamara and described below. We have therefore adapted this initial model, by adding variables on program operation and co-ordination in addition to the variables affecting the development of the mentoring relationship. As a result, we have therefore opted for an evaluation mode for the process which answers the following questions: how does the program function? What is its structure, its unfolding, its strengths and limits? How does our program operate? It is this type of evaluation that will allow us to draw a model to analyze actual practices.

In this connection, we needed to ask program co-ordinators:

- the reasons mentoring programs were introduced;
- program inputs, that is, the resources required to operate the programs;
- participants' characteristics;

SUGGESTED FRAMEWORK FOR RESEARCH PROJECT ON MENTORING
CONTEXT

Characteristics of parent organization
Mission
Corporate culture, particularly regarding mentoring
Reasons for starting a mentoring program
Program objectives and design
Partners
Human and material resources

MENTORS	**PROTÉGÉS**	**SELECTION***	**CO-ORDINATION***
Characteristics	Same list of	Recruiting	Support
- Professional	characteristics	Matching	Training
- Personal	as for mentors	Ratio	Tools
- Background		Other factors	
- Other			

MENTOR-PROTÉGÉ RELATIONSHIP

Duration, Frequency, Process, Commitment, Meeting content
Learning, Mandates, Activities, Code of ethics, other factors

OUTCOMES OF THE RELATIONSHIP

Quantitative, Qualitative, Positive and Negative
On organization
On program operation
On participants
Measurements and Evaluation (of objectives, support structure, benefits)

DIAGNOSTIC*
Success factors...
Lessons learned...
Avenues for development*

- co-ordinators' role;
- the process to which participants make a commitment, for example, roles, requirements and duration;
- evaluation methods used;
- program strengths, evaluated from various standpoints;
- main program limitations, complaints or difficulties;
- main development objectives; and
- recommendations.

Briefly, for each mentoring program described, the purpose of our research project was to identify inputs (required resources), processes (services provided, operations, clients), outputs (quantitative and qualitative information on performance) and effects (repercussions, strengths, limitations). Then, in analyzing all this information, we tried to highlight **emerging common factors** and to organize them into a model.

For this analysis, we chose three information-gathering methods: the questionnaire, interviews and the focus group. Firstly, the questionnaire had the advantages of quickly producing a body of information about the programs, and facilitating compilation and analysis. Our questionnaire was developed using the selected basic model described above, and included the same major divisions: context; operations; the mentoring relationship; and evaluation of outcomes.

Secondly, interviews provided us with greater depth about the data gathered, particularly qualitative information that is hard to obtain using questionnaires. Lastly, once an initial analysis had been carried out and some hypotheses developed, we considered it appropriate to bring together a focus group of well-informed observers and to obtain their impressions and reactions in order to validate our initial findings.

Briefly, here are certain results which have been subsequently criticized by the focus group; the first results of this consultation have allowed us identify certain paradoxes describing the mentoring situation in Quebec. Finally, recommendations presented in the form of premises, introduce the presentation of our model.

A Few Results

Based on the analysis of the questionnaires, enriched by the comments collected from the interviews, we identified five major observations, which we have submitted to our experts on the focus group. The results are as follows :

- In 78% of the mentoring programs we studied, recruiting is taking place with **mentors who were men**; slightly less than 40% of mentors were women; because of their mandates, the three programs that worked with women mentors, were excluded.
- Of Cohen's six recognized **mentoring functions**, the ones most often exercised by mentors were: establishing an atmosphere of trust; offering advice (information and coaching); and providing support to facilitate choices; that is, functions I, II and III. Few mentors stated that they emphasized the other functions of confronting protégés, acting as role models, or helping them make their visions a reality.
- Of the programs, 41% offered **training** for mentors and protégés; 41% organized informal meetings (particularly for mentors) to promote exchanges; and 30% organized neither training nor informal meetings.
- In 78% of the mentoring programs studied, the **program co-ordinators** spent less than two days per week operating these programs. They spent most of that time on recruitment, file maintenance, distribution of information, and establishing mentor-protégé matches. A number of them said they would like to spend more time on leadership including training, follow-up, and providing support for matches.
- Mentoring programs are unlikely to carry out **evaluations**; the evaluations that have been done have focused on participant satisfaction, most often using questionnaires (58%), or compilation of feedback expressed at informal meetings, impromptu conversations, and team meetings (29%).

These five findings lead us to the following questions: Why do we have difficulty recruiting women mentors?

Why is it that the majority of mentors do not practice the functions related to confrontation, acting as role models, and helping make protégés' visions a reality? Why do the majority of programs not organize training sessions for their participants? Why do the co-ordinators confine themselves to management tasks? And, finally, why is evaluation the *poor relative* in managing mentoring programs?

The results presented have therefore brought about questions that the members of the *focus* group have examined and put in the form of paradoxes, in order to give our basic model practices and solutions for by-passing these hurdles. Here then are the four paradoxes stemming from the results.

A few paradoxes

1. Mentoring requires of mentors the so-called feminine traits of listening, trust, and caring; this relational characteristic is recognized as vital both to women's career paths and to mentoring relationships. However, mentoring programs find it more difficult to recruit women mentors, and are not managing to recruit an equitable representation of male and female mentors that reflect a mixed professional representativity. We should question ourselves on what influences this matter: is it the double chore which women are still hit with which make them refuse a volunteer involvement outside work and family? Is the recruitment of mentors being done at paraprofessional meeting places where women are less present...?

2. Focus group members unanimously felt that the mentoring relationship is a special one that develops over the **long-term** and focuses on developing the person **as a whole**. In reality, mentoring programs are set on **specific, often time-limited goals** and focus more on the short-term project (job justification, success of business, employment maintenance) than on the development of the individual and his projects over the long-term. In so doing, they may encourage mentors to concentrate on functions I, II and III, at the expense of the

functions of confrontation, acting as role models, and helping make protégés'life project a reality.

3. Lack of resources and time meant that program co-ordinators spent more time on management than on activities related to the essence of mentoring, including the relational aspect and follow-up on mentor-protégé pairs, training and support.

4. Program co-ordinators felt torn between their desire to emphasize quality and provide an effective support structure for the mentoring relationship, and the need to report on performance in order to obtain adequate funding. They are using the evaluation for only that purpose, and are not much preoccupied with it in the continuous improvement of their services.

Our Quebec Model

Starting with these results and these paradoxes, we arrive at a point of being able to design a model that is sufficiently simple and sufficiently complete to supply a realistic framework to people wanting to develop formal mentoring activities. We have started our modelling by putting the emphasis on five premises, thus illustrating five basic practices, which should facilitate the implementation of mentoring programs.

First premise: We have noticed that many mentoring program co-ordinators devoted their available time to the mentor, more than to the protégé. We suggest rather that the mentoring programs should be centred equally on the mentor and the protégé, as much on training as follow-up, given the fact that the ultimate goal of the mentoring activity concerns the protégé's fulfilment and development.

Second premise: A mentoring program should make a pre-selection of participants, by providing them with information on program aspects that will allow them to assess the requirements of possible involvement. If recruitment includes right from the start orientation activities to situate potential participants, supply them with basic information, and instruct them on program requirements…the recruiting operation increases its efficiency.

Third premise: A mentoring program should use volunteering to support day-to-day management. Volunteers are first of all mentors, but could become on occasion trainers, communicators and others, all this under the governance of the program co-ordinator.

Fourth premise: A mentoring program should provide training activities, to at least clarify the roles and distinguish mentoring from other forms of support, to present at least minimal communication skills and to make sure that the basic concepts related to mentoring practice (relationship development, mentoring functions, ethical considerations, etc.) are known.

Fifth premise: As objectively as possible, and for the purpose of continuous improvement, a mentoring program should evaluate whether it has achieved its objectives, participant satisfaction, and the quality of involvement with the protégés.

These five premises ensure that:

1. what are called mentoring programs actually provide mentoring;
2. program participants receive a minimum of training; and
3. activities are followed up on and evaluated.

Prerequisites

To be achievable, these premises should be used in conjunction with prerequisites which facilitate the day-to-day management of the programs:

- a clear mandate supported by the organization;
- resources (financial, human and material resources) appropriate to the roles and responsibilities inherent in operating a mentoring program; and
- conditions that ensure that programs are not isolated and offer opportunities to exchange expertise and tools.

These premises and prerequisites therefore accompany our model and attribute to it important intrinsic qualities to guide and structure the development of mentoring activities.

ILLUSTRATION OF MODEL

I. CONTEXT

Diagnosis I. - Origin II. - Objectives III. - Indicators for validation	Parent or funding organizations (support, mandate, and resources)	Project development (e.g. design, distribution of information and operation)	Pilot Project Transition objective Initial clients

Evaluation of experiment
Adjustments
Re-evaluation of mandate and resources

II. OPERATION

Recruitment of other volunteers (program management)	Recruitment of mentors (men and women) *Selection, if applicable	Recruitment of protégés *Selection, if applicable

Matching, preparation, and work plan for pairs

Follow-up
Accompaniment
Support Structure

III.TRAINING

Basic kit
Orientation Tools
(e.g. roles, ethics, and requirements)

Personal contacts
(e.g. telephone calls and meetings)

At a distance, on-the-spot
(e.g. reports and logbook, etc.)

Advanced training
(e.g. the mentoring relationship and career development, etc.)

IV. EVALUATION

I. Of operations
II. Of satisfaction
III. Of learning, benefits

Adjustments Improvements	**Diagnostic**	**Distribution of information**

Conclusion: Issues in Developing Mentoring in Quebec

The stakes represent the markers which guide the development of high-quality mentoring; they point to financial and other resources, accompaniment in the mentoring relationship, and evaluation.

Firstly, to facilitate this development, we consider it important to invest in a more formal network where individuals directly or indirectly involved in mentoring practice can find resources, tools and references. A more formal network would help distribute information on the mentoring culture described above and help eliminate existing confusion about the concept of mentoring. Although mentoring is becoming fashionable again, there is a danger of applying the related practice indiscriminately. Thus, it is important to channel this development, without limiting the originality of mentoring initiatives, or, at the very least, to make information available on the theoretical and practical framework that situates the concept and its application. In Quebec, an organization called "Mentorat Quebec", formed at the second conference on "Mentoring and the World of Work", held in May 2002, will play that role of gathering and diffusion.

Mandates, as well as financial and other resources available to program co-ordinators in operating mentoring programs, need to be addressed. If we develop only high-quality programs, parent and funding organizations should assess the need for the financial, human and other resources required to introduce, operate, and evaluate mentoring programs and to help ensure that the human relationships initiated through these programs are of high quality and without risk to the protégé's integral development.

If program co-ordinators have adequate resources and appropriate tools, then they can focus on the essence of mentoring practice, by following up on developing mentor-protégé relationships and making this accompaniment central to training and evaluation.

Mentoring programs cannot focus on quality without more formal evaluation of their operations and impacts of their actions. In parallel with local program evaluations, it is important to carry out stricter and more comprehensive evaluations of overall mentoring practice, for example, the impacts of this activity on personal development. Often, more scientific study supports and enhances good ideas and practices by ensuring that they are developed efficiently.

Finally, mentoring is not a declining activity; on the contrary, our research proves unequivocally that current mentoring practice is of high quality, considering the fact that mentoring programs are new and lack resources and references. These programs therefore need the resources to continue their work: we know that this method of support is effective, focuses on personal development through a special human relationship, and illustrates the highest social values in a community that cares about using full human potential.

Further Research

This research was distributed in 2001 under the title *Mentoring and the World Of Work: A reference model* and was published in French and English at the *Éditions de la Fondation de l'entre - preneurship.* This first project has become the instigator of other initiatives. Indeed, the same analysis is being completed in five other Canadian provinces during 2002-2003 and other tools are in a development stage to accompany pan-Canadian models of winning practices. The work is being pursued in order to supply practitioners in mentoring with the indispensable tools to develop and make their programs work in an efficient way - by referring them to the Quebec model. With regard to this model, here are the themes that we are elaborating on so that all the monographs, making up the reference kit (six monographs) on mentoring related to the world of work in Canada, are completed :

I. The Winning Practices:
The analysis of the winning practices in other provinces, including Ontario, Newfoundland, New Brunswick, Alberta and British Columbia plus a pan-Canadian summary document.

II. The Basic Kit and the Lexicon:
The definitions and the distinctions in concepts, the basic vocabulary with regard to the mentoring relationship, its characteristics, to the functions and implied roles, and to mentoring support in relation to career development and the world of work.

III. Program Elaboration and Set-up:
Definition of program context and functioning, including the mandate, the objectives, the target clientele, the design, the processes of recruitment, selection and pairing, the set-up of a pilot project.

IV. The Role of the Co-ordinator:
The role of the Co-ordinator with regard to program management, training, follow-up, support, and respect for standards of professional conduct.

V. Training for the Dyads:
Tools that deal with themes related to the mentoring relationship, with the goal of supporting the participants, assuring their efficiency and stimulating their motivation.

VI. The Evaluation:
Basic tools allowing the measurement of efficiency and impact as defined at the start: efficient functioning, effects, benefits, satisfaction, etc., and supplying sufficient data to allow programs continuous improvement.

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Le Mentorat et le Monde du Travail: Un Modele de Référénce

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Depuis quelques années, Mentor reprend du service ; de plus en plus, divers types d'organisations reconnaissent que le jumelage entre une personne d'expérience et une autre, moins aguerrie, est un moyen efficace de développement des potentiels personnel et professionnel; du même coup, le mentorat comme mode d'apprentissage génère un impact positif qui favorise le succès des organisations. Rapidement, au Québec, les intervenants impliqués dans ce genre d'activités de jumelage se sont aperçus qu'ils manquaient d'outils pour consolider et raffiner leurs pratiques. La recherche que nous présentons représente une des premières réponses aux besoins exprimés. Elle recense une vingtaine de programmes de mentorat qui concernent la vie professionnelle, en fait l'analyse et dégage un modèle qui peut servir de cadre de référence pour favoriser un développement efficient du mentorat au Québec et ailleurs.

Le mentorat : une pratique qui reprend du service

« Faire du mentorat » est redevenu à la mode. Des *Mentor* et des *Télémaque* répètent l'histoire; on observe dans les années 2000 les mêmes caractéristiques fondamentales, un senior soutenant et éduquant un protégé. De façon générale, le mentorat se greffe sur les stades de vie du protégé en apprentissage et du mentor expérimenté : pour le premier, c'est le vécu de nouvelles expériences ou de transitions, où abondent les défis, et pour le second, c'est l'étape du mitan de la vie, où mettre au profit de la génération suivante ses compétences, ses expertises et sa vision du monde devient un besoin (Houde 1995, p. 29).

Le mentorat veut favoriser la rencontre de ces deux besoins en structurant une activité qui a pour objectif d'initier un rapprochement et de faciliter le développement d'une relation entre une personne d'expérience et un apprenant, le plus souvent dans une finalité de développement professionnel : c'est ce que nous appelons un **programme de mentorat,** aux États-Unis, au Québec et dans le reste du Canada. De cette façon, Mentor reprend du service et n'est plus seul.

On peut définir le mentorat comme un mode d'apprentissage structuré, à la façon de Galbraight et Cohen (1995):

> Le mentorat est un processus interactif de personne à personne qui guide le développement d'apprentissages, basé sur la prémisse que les participants ont des contacts qualitativement et quantitativement suffisants pour permettre ce développement.

Le mentorat au Québec et ailleurs

Depuis près de vingt ans, les Américains ont remis à l'honneur la pratique mentorale. Leurs écrits à ce sujet décrivent l'existence de nombreux programmes de mentorat qui ont pour objectif le soutien aux jeunes défavorisés pour l'accession ou le maintien aux études, l'intégration de jeunes professionnels dans divers secteurs d'activités, autant que le soutien aux jeunes entrepreneurs (SCORE : Service Corps of Retired Executives) et la gestion des ressources humaines en entreprise. Faire une recension de ces écrits représenterait une recherche en soi.

Au Canada, le programme *L'École avant tout* en 1992 est une des initiatives qui a repositionné le mentorat comme activité bénévole importante pour aider les jeunes en danger de décrochage scolaire. Par ailleurs, le rapport de *Peer Resources* fait état d'expériences de mentorat dans les entreprises canadiennes, autant que dans les écoles et les organismes communau-taires. La pratique canadienne suit de près celle de son voisin du sud et se développe depuis une quinzaine d'années; de la même façon, elle concerne des objectifs de développement professionnel et des objectifs d'ordre psychosocial. Le Conseil du Trésor (Ottawa) a même crû bon, en 1996, de produire un document intitulé *Lignes directrices pour le développement d'un programme de mentorat*; c'est un document de référence qui a dû inspirer plusieurs maîtres d'œuvre de programmes de mentorat au Canada et au Québec. Plus récemment (janvier 2002), un groupe de personnes impliquées dans le développement du mentorat à travers le Canada a organisé la première conférence nationale Mentorat Canada, qui a regroupé plus de trois cents (300) personnes en provenance de tous les coins du pays; c'est dire que l'engouement pour le mentorat est important ces derniers temps.

Au Québec, les expériences de mentorat recensées ont à peine dix ans. Là encore, les programmes formels se développent dans divers milieux éducatifs, communautaires, corporatifs et organisationnels et ont des finalités reliées au développement professionnel ou psychosocial. Depuis 1990, des écrits sont publiés sur la question; ils sont produits pour plusieurs par des professeurs chercheurs intéressés au développement organisationnel (Lépine, Benabou, Guay), au développement psychosocial de l'adulte (Houde) et aux liens intergénérationnels (Lefebvre). Le réseau des Femmes d'affaires du Québec, l'UQAM et la Chambre de commerce de Montréal, entre autres, ont été parmi les pionniers à organiser des programmes formels de mentorat reliés au monde du travail : soutien à l'entrepreneurship ou développement de carrière. Depuis 1995, plusieurs autres groupes ont emboîté le pas, trouvant que la pratique mentorale pouvait

être un moyen efficace de développement et de transmission des savoirs et une expérience valorisante pour les personnes impliquées. Même le *cybermentorat* prend sa place et se distingue par son originalité (Academos, Psybermentor, uq@mentor).

En novembre 2001, un groupe intéressé par la pratique mentorale au Québec organise un premier colloque qui regroupe les intervenants en mentorat professionnel, dans le but d'échanger sur les pratiques et de cibler les besoins en la matière. Une des recommandations qui émerge de cette réunion met en évidence le manque d'outils et le manque de référence sur ce que représente une activité mentorale de qualité. De là le mandat de la recherche que nous allons maintenant décrire.

Notre recherche : Le mentorat et le monde du travail

Cette recherche vise l'objectif général suivant :

> **Dégager un modèle québécois porteur d'avenir pour le développement du mentorat au Québec**

Pour ce faire, nous avons sollicité dix-huit programmes de mentorat dont la finalité concerne le développement de carrière et le monde du travail, issus de milieux aussi divers que possible pour constituer un échantillon le plus représentatif de la réalité québécoise : organismes communautaires, milieux de l'éducation, organismes de soutien à l'entrepreneurship, entreprises privées, associations et ordres professionnels, etc. À l'aide d'un questionnaire et d'une entrevue, nous avons rejoint les coordonnateurs de ces programmes et les avons questionnés sur leurs pratiques. Nous portons une attention particulière à leur évaluation des forces, des limites et des mécanismes qu'ils jugent efficients dans le fonctionnement de leur programme et de l'impact du mentorat sur leurs clients. Nous retirons de cette analyse le niveau d'importance accordé aux ingrédients ayant servi à la mise en place, au processus et au fonctionnement, au suivi et à l'évaluation et nous dégageons de ces observations un modèle structural pour le développement du mentorat. Enfin, à la lumière des constatations auxquelles nous

arrivons, nous discutons des enjeux qui accompagnent le développement du mentorat à dominante professionnelle, au Québec.

Notre modèle de base

Plusieurs auteurs, surtout américains, ont structuré des modèles pour l'étude du mentorat, chacun d'eux s'attardant à différentes dimensions du concept. À titre d'exemples, Murray (1991) a façonné un modèle générique pour faciliter la mise en place d'un programme; elle en décrit les composantes et les inscrits en séquence dans le temps. Ailleurs, dans une approche managériale, Johnson (1997) trace plutôt un modèle stratégique de mentorat, dans lequel, tour à tour, l'individu, le groupe et l'organisation profitent de stratégies visant à faciliter le développement de compétences (*learning*), le sens du leadership (*leading*) et les habiletés interpersonnelles (*relating*). Nous avons plutôt choisi de nous inspirer du cadre suggéré par Hunt et Michael (1983) de l'Université de Miami. Ils présentent leur structure comme une base pour la recherche sur la relation mentorale, leur modèle incluant toutes les dimensions qui agissent sur cette relation, i.e. le contexte dans lequel elle s'insère, les caractéristiques des participants mentors et protégés, les étapes de développement de la relation et les impacts dont bénéficient les mentors, leurs protégés et l'organisation. Leur modèle nous semble celui qui se rapproche le plus des éléments d'évaluation de programmes proposés par McNamara. Nous avons adapté leur schéma initial, en y ajoutant une variable sur le fonctionnement et la coordination d'un programme, variables parallèles à celles qui influent sur le développement de la relation mentorale.

Nous avons donc opté pour un mode d'évaluation du processus qui répond aux questions suivantes : comment notre programme fonctionne-t-il? Quelle est sa structure, son déroulement, ses forces, ses limites? Comment notre programme opère-t-il? C'est ce genre d'évaluation, à notre avis, qui nous permettra de dégager un modèle de l'analyse des pratiques actuelles.

Pour ce faire, nous avons questionné les coordonnateurs de programmes sur :

- Les motifs de mise en place des programmes
- Les intrants : les ressources requises pour rendre le service
- Les caractéristiques des participants
- Le rôle du coordonnateur
- Le processus dans lequel les participants s'engagent : rôle, exigences, durée, etc.
- Les méthodes d'évaluation utilisées
- Les forces du programme, évaluées sous diverses facettes
- Les principales faiblesses, plaintes, difficultés, etc.
- Les principaux objectifs de développement et les recommandations

En résumé, notre enquête fait ressortir pour chacun des programmes décrits les intrants (les ressources requises), le processus (le service offert, le fonctionnement, la clientèle, etc.), le rendement (données quantitatives et qualitatives) et les impacts (les forces, les limites). Pour analyser l'ensemble des données, nous avons ensuite fait ressortir les **facteurs communs émergents** que nous avons schématisés, modélisés.

Pour réaliser cette analyse, nous avons choisi trois méthodes de collecte de données : le questionnaire, l'entrevue et le groupe focus. Dans un premier temps, le questionnaire a l'avantage d'aller chercher rapidement un ensemble d'informations sur les programmes, tout en facilitant la compilation et l'analyse. Notre questionnaire a été bâti selon le modèle de base choisi et décrit précédemment et se compose des mêmes grandes divisions, soit le contexte, le fonctionnement, la relation mentorale et, enfin, l'évaluation. Ensuite, l'entrevue nous permet d'approfondir l'information colligée et d'aller chercher des aspects plus qualitatifs, difficilement descriptibles par la voie d'un questionnaire. Finalement, une fois un premier travail d'analyse effectué, au moment où certaines hypothèses se dessinent, il est pertinent de réunir un groupe d'observateurs avertis (groupe *focus*) et d'obtenir leurs impressions, leurs réactions afin de valider nos premières conclusions.

Voici brièvement certains résultats obtenus qui ont été subséquemment critiqués par le groupe *focus* ; cette confrontation devant les premiers résultats

CADRE SUGGÉRÉ POUR L'ÉTUDE DU MENTORAT
LE CONTEXTE
Caractéristique de l'organisation qui offre le programme
Sa mission
Sa culture / au mentorat
L'origine du programme : pourquoi ce programme?
Ses objectifs, son design
Ses partenaires
Ses ressources humaines et matérielles

Les mentors	Les protégés	La sélection*	Coordination*
Caractéristiques professionnelles et personnelles, provenance, etc.	idem	**le jumelage** **le ratio, etc.**	**le recrutement Encadrement** **la formation et** **les outils**

LA RELATION MENTORALE
Durée, fréquence, processus, engagement, contenu des rencontres,
apprentissages, mandats, actions, code de déontologie etc.

―――――――――――

LES IMPACTS : quantitatif, qualitatif, + et –
Dans l'organisation
Dans le déroulement du programme
Pour les participants
Les mesures et l'évaluation (objectif, structure, bénéfices)

―――――――――――

Le diagnostic*
Les facteurs gagnants…
Si c'était à refaire…
Les pistes de développement *

―――――――――――

a permis de mettre en évidence certains paradoxes décrivant la situation du mentorat au Québec. Enfin, pour finir, certaines recommandations présentées sous forme de prémisses introduisent la présentation de notre modèle propre modèle québécois.

Quelques résultats

À partir de l'analyse des questionnaires, bonifiée par les propos recueillis lors des entrevues, nous mettons en évidence cinq grandes observations, que nous avons soumis à nos experts du groupe focus; ces résultats sont les suivants :

- Pour 78% des programmes de notre recherche, le recrutement se fait en majorité chez les **mentors de sexe masculin**; l'ensemble des programmes, à l'exception de ceux dont la mission est précisément de s'adresser aux femmes (3), fonctionne avec une représentation de moins de 40 % de mentors féminins.
- Des six **fonctions mentorales** reconnues (Cohen), celles qui sont le plus fréquemment assumées par les mentors se centrent sur l'établissement du climat de confiance, le rôle conseil (information, coaching) et le soutien face aux choix, soit les fonctions I, II et III. Peu de mentors insistent sur les trois autres fonctions : confrontation, rôle modèle et le projet de vie à plus long terme.
- 41% des programmes offrent de la **formation** pour les mentors et pour les protégés; 41% organisent des rencontres informelles (surtout pour les mentors) qui favorisent les échanges. 30% n'organisent ni formation, ni rencontre informelle.
- Pour 78% des programmes, les coordonnateurs s'occupent du dossier « mentorat » à moins de 2 jours/semaine. Les **coordonna-teurs de programme** passent la majorité de ce temps au recrutement, à la tenue des dossiers, à la diffusion, et au jumelage. Ils souhaiteraient pour plusieurs passer plus de temps à l'animation (formation), au suivi et à l'encadrement des dyades.
- Les programmes de mentorat sont peu enclins à **évaluer leurs interventions**; s'ils ont effectué une évaluation, ils l'ont surtout fait porter sur la satisfaction de leurs participants et ce, surtout à l'aide d'un questionnaire (58%), sinon à partir de *feedback* colligés lors des rencontres informelles ou de conversations ponctuelles ou de réunions d'équipe (29%).

Ces cinq observations mènent aux questions suivantes : Pourquoi avons-nous de la difficulté à recruter des mentors féminins? Pour quelles raisons la majorité des mentors pratiquent peu les fonctions reliées à la confrontation, au

modelage et à la vision du rêve de vie? Pourquoi la majorité des programmes n'organisent pas de formation pour leurs participants? Pourquoi les coordonnateurs se confinent-ils dans des tâches de gestion? Et, enfin, pourquoi l'évaluation devient-il le *parent pauvre* dans la gestion des programmes de mentorat? Les résultats présentés ont donc suscité des questionnements que les membres du groupe *focus* ont interrogés et mis sous forme de paradoxes, tous plus intéressants les uns que les autres, afin de donner à notre modèle de référence des formes de pratiques et des pistes de solution pour éviter ces écueils. Voici donc les quatre paradoxes qui ressortent des résultats.

Quelques paradoxes

1. Le mentorat est une activité qui sollicite chez le mentor des qualités dites féminines d'écoute, de confiance et de soin; la qualité relationnelle du cheminement de carrière des femmes est reconnue comme centrale, comme elle l'est dans l'activité mentorale. Pourtant, les programmes de mentorat ont plus de difficultés à recruter des femmes mentors et ne réussissent pas à obtenir une participation proportionnelle d'hommes et de femmes afin de favoriser une représentativité professionnelle mixte. Il faudrait se questionner sur ce qui influence cet état de fait : est-ce la double tâche dont les femmes écopent encore qui les fait refuser une implication bénévole extérieure au travail et à la famille? Le recrutement des mentors s'effectuent-il à des endroits de retrouvailles para-professionnelle où les femmes sont moins présentes….?

2. Tous s'entendent pour dire que la relation que le mentorat propose est une relation privilégiée qui se développe à **long terme** et qui se centre sur la personne dans la **globalité** de son devenir; par ailleurs, les programmes déterminent des **objectifs spécifiques, souvent encadrés par une durée prédéterminée**, et se centrent ainsi plus sur le projet à court terme (l'obtention d'un poste, le succès de l'entreprise, le maintien en emploi, etc.) que sur le développement de la personne et de ses projets, à long terme. Ce faisant, par leur gestion quotidienne, ils peuvent favoriser la concentration des tâches des mentors aux fonctions I, II et III, au détriment des fonctions de modelage, de confrontation et de révélation du projet de vie.

3. À cause du manque de ressources et de mandat partiel et du manque de soutien de leur organisation, les coordonnateurs consacrent plus de temps aux activités de gestion qu'à celles qui concernent l'essence même de l'activité mentorale, soit l'aspect relationnel et le suivi des dyades, la formation, l'animation.

4. Les coordonnateurs de programmes se sentent coincés entre le désir de miser sur la qualité, en se centrant sur un encadrement efficient de la relation mentorale, et le besoin de rendre des comptes sur le rendement pour pouvoir obtenir un soutien financier adéquat. Ils ne se servent de l'évaluation qu'à cette fin, et s'en préoccupent peu pour l'amélioration continue de leurs services.

Notre modèle québécois

Partant de ces résultats et de ces paradoxes, nous en arrivons à tracer un modèle suffisamment simple et suffisamment complet pour fournir un encadrement réaliste aux personnes désireuses de développer des activités mentorales formelles. Nous avons démarré notre modélisation, en mettant en exergue cinq prémisses, illustrant cinq pratiques de base qui doivent faciliter l'implantation des programmes de mentorat :

Première prémisse : Nous avons remarqué que plusieurs coordonnateurs de programmes de mentorat consacraient leur temps disponible au mentor, davantage qu'aux protégés. Nous suggérons plutôt que les programmes de mentorat doivent se centrer également sur le mentor et sur le protégé, autant dans la formation que dans le suivi, étant donné que l'objectif ultime de l'activité mentorale concerne la réalisation et le développement du protégé.

Deuxième prémisse : Un programme de mentorat doit faire de la tâche du recrutement une opération qui déclenche déjà par elle-même une présélection des participants, en leur donnant les éléments nécessaires pour évaluer les exigences de leur implication éventuelle. Si le recrutement inclue dès le départ des activités d'orientation, qui situent les participants potentiels, leur fournit l'information de base, et les instruit sur les exigences du programme, etc. l'opération recrutement accroît son efficacité.

Troisième prémisse : Un programme de mentorat aurait avantage à utiliser le bénévolat pour soutenir la gestion au quotidien. Les bénévoles sont de prime abord des mentors, mais peuvent aussi devenir à l'occasion des animateurs, des relationnistes, etc. , tout ceci sous la gouverne du coordonnateur de programme.

Quatrième prémisse : Un programme de mentorat doit prévoir un volet *Formation* qui assure minimalement que les rôles sont clairs pour les participants et distincts de d'autres formes de soutien, que les habiletés minimales de communication sont présentes et que les concepts de base rattachés à la pratique du mentorat (développement de la relation, fonctions, etc.) soient connus.

Cinquième prémisse : Un programme de mentorat doit s'assurer d'évaluer le plus objectivement possible l'atteinte de ses objectifs, de mesurer la satisfaction des participants et la qualité de l'intervention sur le protégé; en ce sens, il devient intéressant de concevoir l'évaluation dans une optique d'amélioration continue.

Ces cinq prémisses nous assurent :

• Que ce qui s'appelle « mentorat » l'est réellement;
• Que les gens qui y participent ont une formation minimale;
• Que les activités sont suivies et évaluées.

Les conditions préalables

Ces prémisses, pour être réalisables, s'accompagnent aussi de conditions préalables, qui facilitent la gestion au quotidien des programmes :

• Un mandat clair, supporté par l'organisation;
• Des moyens (financiers, ressources humaines et matérielles) appropriés aux rôles et responsabilités inhérentes à toutes les facettes de

la gestion d'un programme;

- Des modalités qui assurent que les programmes ne restent pas isolés et ont des occasions d'échanger leur expertise et leurs outils entre eux.

Ces prémisses et ces conditions préalables accompagnent donc notre modèle et lui attribuent des qualités intrinsèques importantes pour guider et encadrer le développement des activités de mentorat.

Conclusion : les enjeux du développement du mentorat au Québec

Les enjeux représentent les balises qui doivent guider le développement d'un mentorat de qualité ; ils se situent aux niveaux des moyens et des ressources, de l'accompagnement de la relation mentorale et de l'évaluation. Dans un premier temps, nous trouvons important pour faciliter ce développement d'investir dans la constitution d'un réseau plus formel, où les personnes impliquées de près ou de loin dans la pratique mentorale trouveront des ressources, des outils et des références ; cela concourt à la diffusion de la culture mentorale, tout en contribuant à réduire la confusion qui existe sur le concept du mentorat. En effet, le mentorat redevient à la mode mais on voit poindre le danger qu'il soit servi à toutes les sauces. Il est donc nécessaire d'endiguer ce développement, sans brimer l'originalité des initiatives, et, à tout le moins, de diffuser et de rendre disponible l'encadrement théorique et pratique qui situe le concept et son application. Au Québec, l'organisme « Mentorat Québec », constitué lors du deuxième colloque sur le *Mentorat et le Monde du travail*, tenu en mai 2002, jouera ce rôle de rassembleur et de diffuseur.

Comme autres moyens et ressources, abordons la question des mandats et des argents dont les responsables disposent pour mener leur programme. Si nous tenons à un développement de qualité, les organismes pourvoyeurs doivent bien évaluer les besoins en terme de ressources humaines et matérielles requises pour la mise en place, le fonctionnement et l'évaluation d'un programme de mentorat et qui concourent à assurer que les rela-

tions humaines qui germent à l'intérieur du programme représentent des interventions de qualité, sans danger pour le développement intégral du protégé.

Si les responsables de programmes ont les ressources adéquates et les outils appropriés, ils peuvent alors se centrer sur la raison d'être de l'activité mentorale, soit assurer le suivi de la relation qui se développe entre les mentors et les protégés engagés dans leur programme et ainsi, faire de cet accompagnement la pierre angulaire de la formation et de l'évaluation.

Enfin, les programmes ne peuvent se soucier de la qualité de leurs interventions, sans procéder à certaines évaluations plus formelles de leur fonctionnement et de l'impact de leurs actions. Parallèlement à ces évaluations locales, il devient aussi important d'évaluer la pratique du mentorat de façon plus globale et plus rigoureuse et de vérifier, entre autre, l'impact de cette activité sur le développement de la personne. La recherche plus scientifique soutient et alimente souvent les bonnes idées et les bonnes pratiques pour leur assurer un développement efficient.

Enfin, le mentorat n'est pas une activité en perdition, loin de là ; cette recherche prouve hors de tout doute que la pratique mentorale qui se fait actuellement au Québec est de grande qualité, si on prend en compte la jeunesse des programmes et le manque de ressources et de références. Il s'agit donc ici de lui donner les moyens de poursuivre son œuvre, parce que nous savons que ce mode d'apprentissage est efficace, qu'il place au centre de son activité le développement de la personne par le développement d'une relation humaine privilégiée et qu'il correspond à des valeurs sociales de premier ordre dans une communauté qui a à cœur l'utilisation de tout son potentiel.

Les projets en cours

Cette recherche a été diffusée en 2001 sous le titre *Le mentorat et le monde du travail : un modèle de référence* et publiée en français et en anglais aux Éditions de la Fondation de l'entrepreneurship. Ce premier travail est devenu l'instigateur d'autres initiatives. En effet, la même analyse s'effectue dans cinq autres provinces canadiennes au cours de l'année 2002-2003

et d'autres outils sont en développement pour accompagner les modèles pan canadiens des pratiques gagnantes. Les travaux se poursuivent donc afin de fournir aux intervenants en mentorat les outils indispensables pour développer et faire fonctionner leurs programmes de façon efficace, en se référant au modèle québécois. Voici donc, en référence à ce modèle, les thèmes que nous élaborons afin que l'ensemble des monographies composant la trousse de référence (six monographies) en mentorat relié au monde du travail au Canada soit complétée :

I. **Les pratiques gagnantes :**
L'analyse des pratiques gagnantes dans d'autres provinces, soit en Ontario, à Terre-Neuve, au Nouveau-Brunswick, en Alberta et en Colombie-Britannique, additionnée d'un document synthèse pancanadien.

II. **La trousse de base et le lexique :**
Les définitions et les distinctions de concepts, le vocabulaire de base relié à la relation mentorale, à ses caractéristiques, aux fonctions et aux rôles impliqués, et à l'encadrement du mentorat relié au développement de carrière et au monde du travail.

III. **L'élaboration et la mise en place d'un programme:**
Définition du contexte et du fonctionnement d'un programme, soit le mandat, les objectifs et la clientèle visée, le design, les processus de recrutement, de sélection, de jumelage, la mise en place d'un projet pilote.

IV. **Le rôle du coordonnateur :**
Son rôle quant à la gestion du programme, à l'animation, au suivi, à l'encadrement, au respect des normes d'éthique et de déontologie.

V. **La formation pour les dyades :**
Des outils qui abordent les thèmes reliés à la relation mentorale, dans le but de soutenir les participants, assurer leur efficacité et stimuler leur motivation.

VI. **L'évaluation :**
Des outils de base permettant la

mesure des paramètres de rende-
ment et d'impact définis au départ :
fonctionnement efficace, effets,
bénéfices, satisfaction, etc. et four-
nissant des données suffisantes
pour permettre l'amélioration con-
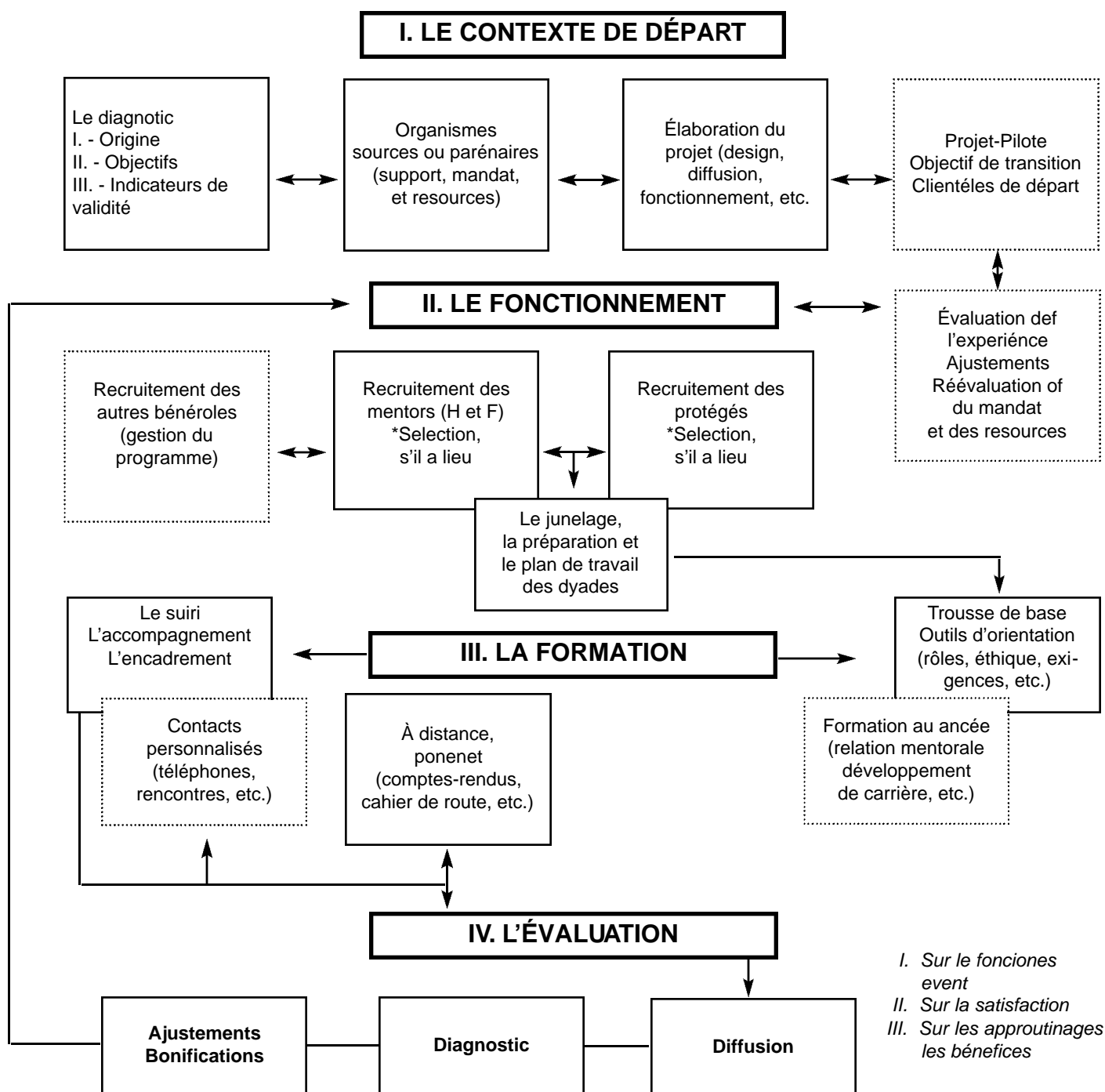tinue des programmes.

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Gestion des paradoxes dans les

LE SCHÉMA DU MODÈLE MODEL

I. LE CONTEXTE DE DÉPART

Le diagnotic
I. - Origine
II. - Objectifs
III. - Indicateurs de
validité

Organismes
sources ou parénaires
(support, mandat,
et resources)

Élaboration du
projet (design,
diffusion,
fonctionnement, etc.

Projet-Pilote
Objectif de transition
Clientéles de départ

II. LE FONCTIONNEMENT

Évaluation def
l'experiénce
Ajustements
Réévaluation of
du mandat
et des resources

Recruitement des
autres bénéroles
(gestion du
programme)

Recruitement des
mentors (H et F)
*Selection,
s'il a lieu

Recruitement des
protégés
*Selection,
s'il a lieu

Le junelage,
la préparation et
le plan de travail
des dyades

Le suiri
L'accompagnement
L'encadrement

III. LA FORMATION

Trousse de base
Outils d'orientation
(rôles, éthique, exi-
gences, etc.)

Contacts
personnalisés
(téléphones,
rencontres, etc.)

À distance,
ponenet
(comptes-rendus,
cahier de route, etc.)

Formation au ancée
(relation mentorale
développement
de carrière, etc.)

IV. L'ÉVALUATION

**Ajustements
Bonifications**

Diagnostic

Diffusion

*I. Sur le fonciones
event*
II. Sur la satisfaction
*III. Sur les approutinages
les bénefices*

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Using Portfolios to Direct Workplace Learning

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Abstract

In this article the author discusses three workplace learning paradigms which can be used by both employees and employers to guide the learning necessary to keep the workforce competitive in today's markets. As a way to operationalize the expectations of these paradigms, portfolios are discussed as a helpful technique to document employees'past learning and to guide their future learning. Further, prior learning assessment recognition is discussed as a way for employers to give recognition to the workplace learning accomplished by employees. The author outlines the essential features, functions and components of portfolios, some non-traditional methods to engage in workplace learning, and describes prior learning assessment recognition and the issues around its use.

Using Portfolios to Direct Workplace Learning

In a recent book about the future of career, Collin and Young (2000) pointed to the need for workers to collectively consider both their needs and those of their employer if they are to achieve meaningful careers. In the same publication, Doyle (2000) highlighted the debate around the idea of career being managed on behalf of the individual and the organization. Part of this debate entails the idea of a "common, shared interest" (p. 229) between the employee and the employer. In a different but related strain of thought, Law (2000) suggested that due to changes in the world of work, ie., globalization, technology, economic trading communities that serial or portfolio careers will become more common with workers experiencing more discontinuities in their work experience. The idea of career as embodying the components of both the needs of the employee and employer, the idea of commonality that the employee and employer have in contributing to economic production,

and the need for skilled workers to keep current in a labour market characterized by frequent movement between workplaces can be brought together by focussing on the work-site.

One aspect of the work-site which deserves more attention is workplace learning. Workplace learning for employees means taking an active part in managing and documenting their job-related learning. For employers, it means seriously considering the benefits of prior job experience as evidence of learning work knowledge and skills. The purpose of this article is to discuss the use of portfolios to guide current and future learning and to highlight the learning which has taken place on the work-site. Often portfolios are viewed as a document which attests to past learning with the view to gaining recognition within an educational institution.

In this article, the writer focusses on three topics: workplace learning and how employees and employers must work together to facilitate this learning; portfolio development as an employee's responsibility, its features, functions and the difficulties in developing one; and, prior learning recognition assessment as an employer's responsibility and the issues surrounding this assessment. Overall, despite the complexity of employee-employer relationships, this article suggests that both parties can work together on the work-site to maximize the possibility of learning and hence contribute to the on-going skill development of the labour force, and to recognize such learning.

Workplace Learning

There are at least two reasons why North Americans should focus on workplace learning (Inman & Vernon,1997). Workplace learning can be a response to the concern about the loss of competitiveness in world trading markets. If North American workers were more engaged and reflective in their work-sites, such as Japanese

workers are reported to be, their productivity and work satisfaction would help to build a competitive edge in world markets. Secondly, due to the increasing rate of technological advances in the work-site, North American workers need to be encouraged to adopt a philosophy of life-long learning, and to engage in learning which reflects the needs of the work-site. These two developments stress the necessity of the employee and the employer working together to enhance workplace learning.

There are three approaches to workplace learning (Inman & Vernon, 1997). The first approach concerns the mastery of skills and their application, an approach termed the technical paradigm. The focus of this paradigm is primarily the domain of workers because it concerns the issue of getting and/or maintaining a job. The criteria used to assess worker competencies within this paradigm are typically pre-established by the employer. Workers must determine their level of competence relative to the demands of the work-site and make decisions based on their self-assessment. Further, workers need to understand the ways that workplace learning can take on new meaning in their lives, an approach known as the interpretive paradigm. Within this paradigm, learning is viewed as a process of interaction between the employee and his or her work-site. This interaction process highlights the need for workers to see learning as a continuous activity with direct benefits. Far too often workers view learning as that which takes place within the traditional classroom, and often they do not recognize non-traditional ways by which learning can take place. Workers should adopt a life-long learning perspective with the view to developing a set of skills which will directly benefit their quality of life. A third paradigm, termed strategic, suggests that workers view their learning and the needs of the corporation from a broader and comprehensive perspective.

Within this approach, employees understand the ways social and economic forces influence them and their work-site. When employees embrace this broad perspective, they readily see the need for life-long learning as necessary to remain competitive in the labour market. They see the need to work with employers to understand the technological and professional changes which are taking place, and how together they can best master the competence to meet these changes. One way to accomplish the tasks inherent in these paradigms is for workers to develop portfolios and for employers to embrace prior learning assessment of employee workplace learning and to provide appropriate recognition of this learning.

Portfolios

In the past, portfolios have been used primarily by artists, designers, and architects. More recently, portfolios are being used by individuals both as they prepare for work and progress in their career. For example, career portfolios are used in the public education system as well in post-secondary institutions (Danielson, 1996). These portfolios are composed of a collection of artifacts which attest to the competencies and academic achievements of the individuals constructing them. Traditionally, the portfolio was an edited and carefully constructed collection of documents which accounted for a person's learning over time (MacIsaac & Jackson, 1994). From a present and future perspective, the portfolio can be conceived as an ongoing plan in which the individual establishes goals, shows evidence of reaching the goals, reflects on and analyzes changing skills and knowledge, and sets out areas for further workplace learning. From this perspective, the use of a portfolio can guide life-long learning (Conference Board of Canada, 1993); as well as, prepare workers for meaningful involvement in the development of their skills and knowledge to keep themselves and their employers competitive in the larger economic community. Workers must take an active part and be responsible for workplace learning if they are to remain viable in this age of global interdependence and technological revolution (Rifkin, 1995).

Portfolio Distinctives

Constructing portfolios is a challenging task due to a lack of standardization in terms of what they should look like and contain. Portfolios are somewhat like resumes in that they may vary in their composition and appearance. However, portfolios may differ in a variety of ways including what is placed in them, how they are developed, their format, their purpose and validation (Canlearn Interactive, 2001).

In spite of the amount of latitude, portfolios have several distinctive features (MacIsaac & Jackson,1994). They serve as a record of accomplishment and attest to the aspect of workplace learning within both the technical and interpretive paradigms. This record of learning should contain specific documents which are credible indicators to support the learning to which the portfolio is attesting. For example, from the technical and interpretative paradigms, some indicators can include letters from employers, transcripts of workshops and/or courses completed, videotapes, reports of credits earned from formal and informal courses, and descriptions of work completed in different work-sites.

Portfolio construction should be a collaborative process. The portfolio should be done in association with colleagues and employers, and consequently reflects aspects of the interpretive and strategic paradigms of workplace learning. Such collaboration fosters reflection and discussion about the content of what was learned, and to some degree, the economic realities faced by the business where the individual is employed. Such reflections should centre around questions like "what did I do?", "what does this mean?", "what have I learned?", "how might I do things differently?", "what are the future realities facing this industry/business?".

Functions of a Portfolio

In addition to having a number of distinctives, constructing a portfolio can serve three functions which ultimately help workers develop their workplace competencies as well as demonstrate their involvement in life-long learning (MacIsaac & Jackson, 1994). The first function of assembling a portfolio helps the employee engage in self-assessment. To accomplish this, individuals take responsibility for assessing their professional development. They determine their levels of employability strengths and weaknesses, and as a consequence set goals as a means to improve their employability potential. This function of a portfolio is reflected when employees attend to the technical and interpretive paradigms of workplace learning. Consequently, the portfolio should contain artifacts which support the results of this introspective self-analysis, as well as an outline of the strategies planned to achieve the learning goals.

Additionally, a second function of portfolio construction is the requirement that employees assess their progress in the workplace. As indicators of monitoring and improving their competencies in the work-site, individuals assemble samples which indicate mastery of their learning goals. This function of portfolio construction necessitates employees to engage in the issues of the technical workplace learning paradigm and to demonstrate evidence of their commitment to a life-long learning philosophy to work-site competency development. Some indicators of these accomplishments include a written paper containing information about the following: an introduction outlining why the artifacts have been included, the work assigned by the work supervisor and his or her evaluation of the work outputs, a description of different samples of work which embody the competencies learned during the performance of the work, a statement indicating what was learned, the process used to accomplish the learning, a statement of the employee's self-perceived strengths and future learning directions.

Lastly, when individuals put together a portfolio in a careful and thoughtful manner, they are challenged to consider how they present themselves and their accomplishments, and demonstrate what they have learned within the technical, interpretative and strategic paradigms of workplace learning. A portfolio which includes evidence of the individual's competencies and his or her on-going learning helps

to present that person in a positive perspective and represents one credible component to offer in the employment seeking and maintaining process. Reflective practice in portfolio development enhances the possibility of an individual getting employment while attesting to his or her engagement in aspects of all three workplace learning paradigms.

Non-traditional Learning Methods

When employees engage in self-assessment, they should consider a variety of non-traditional methods (Henry, 1989) by which they have learned new skills or may learn a number of new work-site skills inherent within the three workplace learning paradigms. Employees need to consider non-traditional learning methods because often they tend to minimize or disregard the learning gained by these methods or they fail to realize that they can use these methods to develop new work-site competencies.

Experiential Learning

Prior to constructing the portfolio, workers need to engage in self-reflection and self-assessment. They need to consider the non-traditional ways in which their work experience has helped them to learn work skills and knowledge. One method used to learn or enhance new skills is "learning by doing." This category accents the technical paradigm of workplace learning (Inman & Vernon, 1997). Workers can reflect on the competencies they have learned by focussing on what they have been or are doing. For example, it is possible that workers such as carpenters or electricians may have been exposed to new ideas and techniques in their work-sites where, through team participation and observation, they have learned the skill of being able to perform routine maintenance tests and checks on new equipment.

Another type of experiential learning is problem-solving. Workers in the building trades may have learned new skills when responding to structural damages in buildings due to excessive weather conditions. In addition to learning the skills involved in assessing the extent of such damages, they may learn ways to repair such damages without

rebuilding the entire structure.

A third method of experiential learning involves the use of media. Distance learning enables an employee to keep abreast of new developments within their work domain. Workers in the building trades can take distance education courses related to new innovations in the workplace. For example, recently lasers have been used to help carpenters install suspended ceilings. Also, computers are now used to custom design furniture, which when used in conjunction with wood-making equipment enable a cabinet maker to achieve a detailed custom product.

Another type of experiential learning focuses on work and community placement. It is possible by working with a mentor or an individual skilled in the use of a piece of equipment to learn new skills. For example, a carpenter who wants to learn the skill of cabinet making and the use of the equipment to accomplish this task, could work with an individual after regular work hours to learn the competencies inherent in this type of work.

Self-Reflection and Analysis

Another broad category of non-traditional learning methods involves workers engaging in self-reflection and analysis both individually and in groups. The methods used in this category help to operationalize the interpretative paradigm in workplace learning (Inman & Vernon, 1997). The use of self-reflection helps employees to consider their past and present learning and to relate this learning to future directions in the work-site.

One way to use self-analysis is to consider prior learning. Workers could review lists of skills and knowledge to determine their competencies and/or deficits. These lists can be obtained from educational institutions or from government officials responsible for labour certification.

Another way to use self-analysis is through the use of narratives. Narratives, which arise from discussion, serve as both process and product in that workers develop a scenario for themselves and the company which helps to guide their future workplace learning. Narratives help workers discover common ground within the

organization. This approach permits workers to see connections between their personal goals and that of the corporation by reflecting on such topics as the knowledge and skill they bring to the workplace, and how this knowledge fits with the strategic plan of the corporation. This process puts the responsibility on both employees and employers to decide what training is needed to meet the demands of the work-site.

Group Discussion

An extension of the use of narratives involves the use of discussion groups to determine where workers need further skill development. Through discussion, particularly between teams, workers can give feedback to one another on their perceived level of competence. Ideally this team approach works best where workers have varying years of work experience and skill development. Workers with more experience could provide feedback to those with less experience, and those with more recent educational experiences could update those who have been out of educational institutions for some time. These activities would help to accomplish the technical aspects of workplace learning. In addition, workers can improve their communication skills by having a colleague observe them and provide feedback based on selected areas of observation. Or, if they decide that communication lines between the office and field workers need improvement, a facilitator could be engaged and the issues discussed and resolved at a meeting between the employer and employees.

The insight arrived at through discussion focussed on social change and how social change influences the demands on the work-site addresses the learning raised in the strategic paradigm (Inman & Vernon, 1997). This type of learning may take place within a staff meeting where employers share the issues facing the industry. For example, the construction trades often work with insurance bureaus when repairing buildings covered by insurance. Insurance bureaus may change the level of competency expected from employees of these firms to guarantee quality in such repairs. It may be necessary for construction firms doing

repairs covered by insurance bureaus to have a certain number of apprentice carpenters and licenced carpenters doing the work. Employers can communicate these changes to their employees. Knowledge of these changes helps employees know and prepare for these future expectations. In this way, the company and its employees engage in process mapping to develop a plan for on-going change.

Elements of a Portfolio

Portfolio preparation is an exercise requiring self-assessment, analysis, synthesis and prioritizing of learning goals arising from reflection on the ways learning has taken place or may take place on the work-site (Mann, 1997). While there may be common features, the purpose of the portfolio is very important in order to guide its structure and the artifacts which are placed in the portfolio (Danielson, 1996). There are a number of common elements to include in a portfolio.

1. *Life history which indicates the most salient events in a person's life*
   This component involves a short (one to two pages) narrative outlining the significant events in the worker's life and how these relate to the individual's personal attributes and values. This life history should indicate the origins of work goals for the employee and how the person views his or her work personality and the skills and competencies presently possessed.

2. *A chronological record which details a list of work experiences since school graduation*
   This aspect contains a list, in outline form, of the work performed by the person including both paid and unpaid experiences. The record should contain the following: when the work experiences were accomplished, the duration and responsibilities of the work experiences, and the location and the name of the immediate supervisor in each work location.

3. *A paper citing life experiences and the learning gained from them*
   This paper should proceed from the first one in which the worker out-

lines what and where workplace learning has taken place. The paper should be short and worded in a concise and clear fashion. This information helps the employer to assess the quality of the learning.

4. *Evidence which supports the learning*
   This evidence includes a number of artifacts attesting to workplace learning. Ideally before this component is completed, the worker should use a list of competencies which outlines the pre-requisite skills and knowledge for the worker in his or her selected area of work. For example, apprenticeship and occupational certification branches of provincial governments publish the competencies needed for workers in a number of trades. Workers should carefully analyze these lists and present artifacts which attest to competencies in these areas. Such artifacts include certificates and diplomas from educational institutions as well as a list of the competencies mastered in the institution, testimonials from peers and supervisors verifying the learning, photos of products demonstrating the competencies being attested to, sample drawing of projects which were undertaken, and/or videos illustrating the person performing the competencies. In addition, it could include outlines of workshops attended.

5. *A paper outlining the person's personal, career and educational goals*
   This paper should be short, about one page, in which the person reviews these goals as arising out of salient work experiences. This report could be presented in outline form so that the employer is able to gain quick knowledge of what the person wants to accomplish.

Portfolio development should not be done in isolation but should directly relate the learning to a goal, ie., meeting technical competence in the workplace. It should be done in consultation with employers or government personnel responsible for labour standards who are knowledgeable about the needs

of the labour market, and who are able to assess the types of learning experiences which demonstrate competence to meet these needs.

Issues in Portfolio Development

Employees may experience some difficulties as they engage in assembling a portfolio (Boud & Walker, 1993). The reflective process requires employees to focus on themselves, their context, and the use of a number of skills and strategies with which to engage in self-assessment. Additionally, the process requires employees to attend to the learning components of their work experience and evaluate the results of their learning. The difficulties which prevent an employee from engaging in this process may come from a variety of sources and can be considered as arising either externally or internally to the person.

One internal source of difficulty centres on the employees' perception of their past work experiences. Three such difficulties include the following: having had negative experiences in their past work histories which do not leave them objective about workplace learning, doing workplace duties without adequate preparation which result in feeling a lack of competence, and working in workplaces which are characterized as stressful.

Further, employees may not be very introspective and may lack self-awareness. They may view learning as only taking place in traditional classroom settings and may find it difficult to see their workplace experiences as learning experiences. They may experience low levels of self-efficacy and/or self-esteem and may feel uncertain and unsure about accepting the responsibility for self-assessment. They may view the expectations from others as being too high and unattainable. Additionally, employees may lack the skills necessary to engage in self-assessment.

Further, external difficulties to portfolio development involve the lack of time required for self-assessment and scenario building, particularly if an employer does not see the benefits of such activity. Also, when all employees do not see the benefits, there may be a lack of support and interest in the discussion required to accomplish the

work which is pre-requisite to portfolio development.

Baud and Walker (1993) offer some suggestion for working with these difficulties. They suggest that if the difficulties have strong emotions attached to them, the employee may want to receive counselling. They outline a four phase process which begins by acknowledging that a difficulty exists, and continues on to clarifying and specifying the difficulty, understanding and explaining the origins of the difficulty and working with the difficulty to desensitize and re-conceptualize it. The use of this process enables employees to have a balanced out-look in their present work location and should enable them to be more objective about their present and past work experiences.

In summary, workplace learning involves two groups of people. Employees, one group, have to take responsibility for their past and future learning and document it in a manner which indicates their competencies to perform a definite skill set or to learn new skills sets in a particular work environment. When employees engage in constructing and maintaining a portfolio, they are able to provide the documentation to support their past and future workplace learning. Employers, the other group, have to be ready to accept evidence of this learning, ie., the contents of the portfolio, and engage in a process known as prior learning assessment recognition (PLAR). When employers trust and recognize the evidence in portfolios, they enhance the possibility of furthering the learning which has or can take place in the work-site, as well as help to lessen the difficulties in transitions for employees moving between work locations.

Prior Learning Assessment Recognition

Portfolios are documents which attest to workplace learning. The knowledge and skills learned in the workplace are typically learned in a non-traditional context and using non-traditional methods. A growing movement which seeks to gain recognition for these non-traditional learning experiences is known as prior learning assessment recognition. This term is used to represent a process which

assesses the efficacy of the artifacts in a portfolio as indicators of significant learning and to award recognition by a credible person, institution or professional body.

Employers need to support and engage in PLAR when they assess workers for the work-site. Employers are appropriate individuals to assess and provide recognition for the contents of portfolios. They are knowledgeable about the skills and processes inherent in the technical, interpretative and strategic paradigms of workplace learnng. Further, their work experiences enable them to assess the skills and knowledge needed to make their work-site productive and competitive. When employers provide PLAR, they contribute to the on-going development needed to keep employees abreast of technological and global demands placed on today's work-site.

What is PLAR?

Proponents of PLAR argue that what one knows is more important than where one learned it. PLAR takes a broad view of learning which encompasses the intellectual, spiritual, emotional, and physical aspects of an individual (Michelson, 1997). PLAR is a means to avoid unnecessary duplication of training and education efforts and is an appropriate way for adults to have their learning assessed, to identify their goals and commitment to life-long learning, and to have these goals and learning accomplishments recognized (Mann, 1997). PLAR documents evidence of both traditionally acquired learning as well as learning gained in non-traditional ways (Barkatoolah, 1989). This movement addresses the question of how life experiences in the area of work, leisure and education can be structured to provide for ease of assessment and accreditation (Barkatoolah, 1989).

A big part of the motivation for PLAR is premised on the reality that economic competition in world markets requires a work-force who can respond to the needs of business but do not have the time to do the lock-step method of demonstrating evidence of their competence (Mann, 1997). In addition, when workers change employment locations

due to changes in the work-site, proponents of PLAR argue that the learning which took place in the previous employment sites should be recognized in any future employment site.

Presently PLAR is primarily used to demonstrate academic competence, but there are indications that it is being used to show evidence of professional competence as well (Michelson, 1997; Fostering a Profession, 1999). Currently, the Standards and Guidelines Initiative has developed standards for the practice of career development in Canada. While further refinement is necessary, the work of the Standards and Guidelines Initiative is based on the assumption that traditional learning venues are not the only ones which can be used by individuals to demonstrate mastery and competence in a work domain. More specifically, individuals will be able to document prior learning experiences gained in non-traditional ways to demonstrate their competence within the broad domain of career development. This recognition provides a sense of social justice for individuals who have gained, in non-traditional ways, the same competences as those who have learned them in them in the traditional manner (Barkatoolah, 1989). When this recognition gains a broader acceptance, it will permit learners entry into professional associations as well as programs of higher learning (Mann, 1997).

Issues in PLAR

There are a number of issues which must be addressed prior to assessing a portfolio (Barkatoolah, 1989). Both employees and employers involved in this task should be aware of these issues and clarify them so that everyone feels that fair play has taken place. One issue is the criteria used for assessing the artifacts in the portfolio and whether these artifacts are suitable indicators to reflect the standards on the work-site. There are two components to this issue. One component involves measuring the indicators and the other involves predicting the fitness of the worker to perform adequately in the workplace. For example, a worker may have all the skills needed to perform the work required but may not be able to do the job with sufficient speed to

ensure accuracy. Speed and accuracy are important factors in productivity but it may be difficult to infer them from learning artifacts. Also, a person may have worked up to expectations in one setting but not be able to meet the expectations of another due to differences between employers. Further, sometimes it is difficult to separate what is being assessed in the portfolio – the person or the artifacts. Often people may feel that their self-worth is being assessed and not the artifacts. This issue raises the importance of employees giving careful thought to including artifacts which accurately indicate their competencies.

Another issue in portfolio assessment involves the background of the worker and the assessor. Each of these individuals has a socialization history with different experiences and expectations. Assessors may have had challenging demands placed upon them to perform tasks at a high level of competency while workers may not have had such expectations. A minimum level of competency is sometimes difficult to determine. For example, it would be difficult to determine the minimum level of competency acceptable in cabinet making due to the many styles and intended purposes of the cabinet being constructed. Ideally the portfolio developer and the assessor should have similar experiences, however, each should be aware of their background to ensure more objectivity and to be aware of the limitations of the assessment process.

In addition, there is the issue of a power imbalance between the assessor and the employee. Employees have a right to a fair reading of the indicators of their competencies, however the assessment process is the responsibility of the assessor. Assessors need to be knowledgeable about how to give feedback to employees. Employees need to have the skills to receive this feedback and to ask questions about the assessment process. Further, there are issues of confidentiality which can influence an employee's self-efficacy and motivation in future such endeavours.

Conclusions

Workplace learning has implications beyond performing the duties required with an occupational position.

Such learning requires employees to go beyond mastery of level entry skills and knowledge and to acquire the future skill needs of their occupation to remain competitive in today's markets. Portfolios represent a multi-textured view of the employee and can be used to demonstrate the products and processes of life-long workplace learning. Constructing a portfolio requires employees to take responsibility for their skill development and to actively seek ways and means to develop new work-site skills. Many of these ways exist on the work-site, and if used, enable employees to continue their life-long learning without resorting to traditional means to develop their competencies. When portfolios are constructed in a thoughtful and reflective manner, employees are able to document their work-site competencies and also present a credible picture of themselves.

Prior learning recognition assessment is individualistic and provides for recognition of the learning acquired on the work-site. Appropriate use of PLAR provides the needed recognition of workplace learning gained over an employee's life-span. Together, portfolios and PLAR provide a direct link between life experiences and workplace learning. The skills of self-assessment and portfolio construction must be learned while workers are in their initial stages of skill and knowledge development, if these skills are to be used to guide their life-long learning. Additionally, employers must be given the opportunity for training in portfolio assessment to ensure an open and fair process, and to provide and encourage the needed recognition of employees who have learned work-site skills and knowledge in non-traditional ways.

In spite of the difficulties inherent in the development and assessment of portfolios, employees and employers must recognize the work-site as a viable place within which to learn competencies for successful deployment on the work-site. When employees and employers work together in an open and fair manner, they ensure a workforce which is skilled to meet the competitive demands of business markets. Together they are able to work in a complementary manner to develop a

vision which helps to revitalize an organization and produce a work environment which provides for human resource development to take place.

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Career Decision-Making Difficulties of First-Year Students

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Abstract

First-year university students often experience career indecision and related career decision-making difficulties. Gati, Krausz, and Osipow (1996) developed a taxonomy for understanding the various difficulties contributing to career indecision. The focus of the current study was to examine their taxonomy with a Canadian sample of university students in relation to career decision-making self-efficacy, sex-role identification, and stage of identity development. Our results indicated a significant negative correlation between career decision-making difficulties and self-efficacy, which discriminated among degree of career indecision and whether or not students had changed their career plans since attending university. Also, there were some significant sex-role orientation and stage of identity differences for some of these variables. Implications for career counsellors are discussed.

Career Decision-Making Difficulties of First-Year University Students

First-year university students are faced with many life challenges, not least of which is the decision about which career path to follow. Unfortunately, many first-year students often experience career indecision, which is conceptualized as "a construct referring to problems individuals may have in making their career decision" (Gati, Krausz, & Osipow, 1996, p. 510). While few if any students are "ideal career planners" (primarily due to the complexity of career planning), some appear to have less career indecision and seemingly find it easier to decide on a career path than others do. Those who struggle with career indecision are likely unable to resolve one or more career decision-making difficulties.

Gati, Krausz, and Osipow (1996) developed a taxonomy for understanding the various difficulties contributing to career indecision. In their taxonomy, a basic distinction was made between career decision-making difficulties occurring prior to the beginning of the career decision-making process and those occurring during the career decision-making process itself. They further subdivided the latter factor, resulting in three subfactors overall: lack of readiness, lack of information, and inconsistent information.

The lack of readiness subfactor was used to account for those career decision-making difficulties that precede engagement in the career decision-making process. Gati, Krausz, and Osipow (1996) identified three theoretical categories of career decision-making difficulties that they believed contributed to a lack of readiness to begin the career decision-making process. These three categories were: (1) a lack of motivation on the part of the individual to begin career decision-making, (2) a general indecisiveness that permeates all types of decision-making for the individual, and (3) various beliefs in dysfunctional career decision-making myths (e.g., career decisions are best made by experts).

The lack of information and inconsistent information subfactors were used to account for those career decision-making difficulties that occur during the process of career decision-making. The lack of information subfactor was divided into four additional categories of career decision-making difficulties: (4) lack of information about the career decision-making process (i.e., not knowing how to make a career decision); (5) lack of information about the self (e.g., not having knowledge about capabilities, personality traits, or interests); (6) lack of information about occupations (e.g., not understanding what work is involved in specific occupations and not knowing about the wide range of occupational options available); and (7) lack of information about ways of obtaining career information (i.e., confusion about how to begin researching vocational options).

The inconsistent information subfactor was divided into three categories of career decision-making difficulties: (8) inconsistent information due to unreliable information (i.e., difficulties related to unreliable or fuzzy information); (9) inconsistent information due to internal conflicts (e.g., difficulties related to the evolving personal identity of the individual); and (10) inconsistent information due to external conflicts (e.g., conflicts involving significant others).

Gati, Krausz, and Osipow (1996) developed a questionnaire (the Career Decision Difficulties Questionnaire) to empirically examine their taxonomy of career decision-making difficulties. They administered this questionnaire to a sample of 259 young Israeli adults who were at the beginning of their career decision-making process and to an American sample of 304 university students. Their results indicated that the pattern of relationship among the 10 decision-making difficulty categories was generally similar to the hypothesized pattern in both samples and that there were no significant differences between the two samples (despite age and cultural differences). They believed their taxonomy of career decision-making difficulties needs further elaboration, especially the 10 decision-making difficulty categories, before it can be claimed that the construct of career indecision is well understood (Gati, Krausz, & Osipow, 1996).

For the current study, we were interested in examining the relationship

of their model of career decision-making difficulties with career decision-making self-efficacy, sex-role identification, and stage of identity development.

We included the variable of career decision-making self-efficacy because there is substantial research to show that it is a major predictor of career indecision (e.g., Betz & Voyten, 1997). The concept of self-efficacy originated from Bandura's (1986) contention that people who believe in their ability to successfully complete the tasks required to achieve an outcome are more likely to engage in and persist at those tasks. This idea has been extended to career development and has become an important variable in understanding the career decision-making process (see reviews by Hackett, 1995; Hackett & Betz, 1992; 1995). For example, Blustein (1989) found that higher self-efficacy about career decision-making was positively related to engagement in career exploratory behaviours. Also, students' self-efficacy beliefs about their capabilities relate to the range and nature of career options considered and that levels of self-efficacy predict "academic performance and persistence as well as career decision-making intentions and behaviors" (Betz & Voyten, 1997, p. 180). Considering these findings, we predicted a significant negative relationship between career decision-making difficulties and self-efficacy.

We included the variable of sex-role identification to examine its relationships with career decision-making difficulties. Several recent studies have examined the relationship among sex-role orientation and choice of major and occupation with conflicting results. Dawson-Threat and Huba (1996) reported that males in male-dominated and female-dominated majors were comparable in masculinity. In contrast, Jome and Tokar (1998) found that career-traditional men endorsed significantly higher stereotypic male attitudes (e.g., "toughness", anti-femininity) than men in non-traditional careers, though there were no differences in conflicts between work and family relations. With a mediated model in a second study, these authors reported that vocational interests mediated the relation-

ship between masculinity and traditionality of career choice (Tokar & Jome, 1998), suggesting the importance of including multiple variables when examining the relationship between sex-role identification and career choice.

Earlier research appeared to more strongly support the contention that sex-role orientation was related to occupational choice. For example, women who were working in more traditional male occupations and who had not attained a college education were found to be more outgoing, active, ambitious, direct and task-oriented than those working in more traditional female occupations (Mazen & Lemkau, 1990). Women in more traditional male occupations have also been found to score higher on the masculinity scale of the Bem Sex Role Inventory (Bem, 1981) than did women in more traditional female occupations. Finally, women in male-dominated majors viewed themselves as less feminine than women in female-dominated majors (Dawson-Threat & Huba, 1996).

Although these studies have identified relationships among sex-role orientations and choice of majors and careers, they have not examined whether there is a significant relationship between sex-role orientation and the degree of career decision-making difficulties or self-efficacy and we wanted to examine those relationships in this study.

Another area that has received attention for its relationship to the career decision-making process is stages of identity development. Several developmental theorists have identified the process of developing one's vocational identity as an important part of becoming an adult. For example, Erikson (1968) conceptualized vocational identity as an important aspect of overall development. Marcia (1966, 1980) operationalized Erikson's conceptualizations and identified four main stages of identity development, which are related to the degree of commitment to one's beliefs and values on a variety of issues. These four stages are conceptualized in a hierarchy, starting with the Diffusion status, when the individual has not experienced a devel-

opmental crisis yet and therefore would not have made a commitment to vocational choice. The second stage is Foreclosure, which represents an ongoing identification with childhood values and although they may have made a vocational commitment, it likely was without sufficient self-exploration. The third stage is Moratorium, in which the individual is beginning to question her/his values and is exploring options but has not yet made a commitment. The final stage is Achievement, which represents a clear commitment to a vocational area.

For first-year university students, it is unlikely that many will be at the Achievement stage and be able to make a career decision that is well-researched and congruent with their interests, personality, skills, and values. There have not been many studies that have researched career decision-making and stage of identity development. One study that researched grade seven to 12 students' identity status and degree of career indecision found that those in the Achievement category has significantly less career indecision than those in the other three identity categories (Vondracek, Schulenberg, Skorikov, Gillespie, & Wahlheim, 1995). We wanted to investigate whether this pattern of results would be replicated with a first-year university sample.

In summary, our hypotheses were that career decision-making difficulties would be negatively related to career decision-making self-efficacy, that participants who identified with a masculine or androgynous sex-role orientation would have fewer difficulties and higher self-efficacy than those with feminine or undifferentiated sex-role orientations, and that those participants in the Achievement identity category would have fewer career decision-making difficulties and higher self-efficacy than those in the other three identity categories.

Method

Participants

We received responses from 189 students initially and 155 of these students were in their first year of university. Data from six of the 155 first-year students were removed due to low

response rate, missing data, and multivariate outliers. Therefore, we had 149 first-year participants' responses included in the analyses.

Sixty-two percent of the respondents were women and 38% were men. The question about the participants' current age was presented in categorical format. For the 149 participants, their age range was "under 18" to "over 25" years, with the majority (48.3%) indicating that they were 18 years of age; 80% were 19 years of age and younger. Seventy-three percent indicated their racial background to be Caucasian, 8.7% indicated Asian, and the remaining participants indicated other responses.

Instrumentation

Demographic, Career Decision-Making Strategies, and Qualitative Questionnaire. On this questionnaire, participants indicated their sex, age, racial background, year at university, socioeconomic status, current career decision-making status using very undecided, slightly undecided, or not at all undecided (which is a question from the CDDQ, described below), and the strategies they have used to make career decisions to date by endorsing items on a checklist.

Career Decision Difficulties Questionnaire (CDDQ; Gati, Krausz & Osipow, 1996). The CDDQ is a 44-item questionnaire developed to assess career decision-making difficulties based on the taxonomy proposed by Gati, Krausz, and Osipow (1996). The internal consistency reliability coefficients ranged from .70 to .93 for the three scales and it was .95 for the full questionnaire. For our study, the alpha internal consistency reliability coefficients were .80, .95, .91, and .96 for the Lack of Readiness, Lack of Information, and Inconsistent Information subscales, and the full scale, respectively. The CDDQ has been found to have a good convergent validity with the Career Decision Scale and good discriminant validity (Lancaster, Rudolph, Perkins & Patten, 1999; Osipow, 1999).

Career Decision-Making Self-Efficacy - Short Form (CDMSE-SF; Betz, Klein, & Taylor, 1996). The CDMSE-SF is 25-item questionnaire

that uses a 5-point scale. The full test score can range from 25 to 125, with higher scores indicating more self-efficacy. Reliability of the short form as measured by coefficient alpha is .94 (Betz, Klein, & Taylor, 1996), which compares well to the coefficient alpha (.97) of the original Career Decision-Making Self-Efficacy Scale (CDM-SES). For our study, the alpha internal consistency reliability coefficient was .92. The CDMSE-SF has been found to have good concurrent validity with the Career Decision Scale and My Vocational Situation (Betz, Klein, & Taylor, 1996).

Bem Sex Role Inventory (BSRI; Bem, 1981). The BSRI is a 60-item questionnaire that uses a 7-point scale. Twenty items are considered to be stereotypically feminine, 20 stereotypically masculine and 20 are used as filler items (e.g., reliable). Masculine and feminine scores are computed by averaging the raw score of the 20 items designated for each scale. A median split method is used to classify participants into one of four groups: masculine identified, feminine identified, androgynous, and undifferentiated. Internal consistency for the masculinity and femininity scales are reported to be between .75 and .87 (Bem, 1981). For our study, the alpha internal consistency reliability coefficients were .85 and .82 for the masculinity and femininity scales, respectively. The BSI has adequate validity (Bem, 1981).

Extended Objective Measure of Ego Identity Status (EOM-EIS; Bennion & Adams, 1986). The EOM-EIS is a 64-item questionnaire that measures the presence or absence of crisis and commitment in different domains of identity development. It is based upon the identity development interviews constructed by Marcia (1966, 1980) and participants' responses are scored to correspond with one of Marcia's four identity stages: diffusion, foreclosure, moratorium, and achievement. The EOM-EIS has been found to have good internal consistency and good discriminant, convergent, concurrent, and predictive validities (Bennion & Adams, 1986).

Procedure

Students who were enrolled in the

Introduction to Psychology course at a large, urban university in western Canada were asked to voluntarily and anonymously complete the package of questionnaires as an option for meeting requirements for experimental credits. The participants completed a consent form that reminded them that they were free to withdraw from this study at any time without penalty. Following completion of the questionnaires, the participants were provided with a feedback sheet that indicated university career counselling services that they could access.

Results

Two of the main questionnaires that we used required classification of participants' scores, which is outlined in the questionnaires' manuals. For the BSRI, which measured sex-role orientation, 24.8% were "masculine", 24.8% were "feminine", 18.1% were "androgynous", and 28.2% were "undifferentiated", while 4.0% were not classified. For the EOM-EIS, 21.5% were "diffusion", 16.8% were "foreclosure, 38.3% were "moratorium", and 8.7% were "achievement", while 14.8% were not classified.

In response to a question regarding degree of career undecidedness from the CDDQ that is not included in the scoring of the subscales or total, 16.1% were very undecided, 48.3% were slightly undecided about their career choice, while the remainder indicated that they were "not at all" career undecided (one participant did not answer this item). Also, we asked a question regarding whether students had changed their career plans during their first year at university and 36.7% responded affirmatively (two participants did not answer this item).

The means for the CDDQ and the CDMSE-SF were 152.32 ($SD = 61.56$) and 91.24 ($SD = 14.59$) respectively and the correlation was -0.63; these scores were dependent variables in the analyses.

To determine whether there were significant differences by sex-role identification on the main variables, a MANOVA was performed with the four categories of sex-role identification as the independent variable and the CDDQ total and the CDMSE-SF total

as the dependent variables. The analysis was significant, $F (6, 278) = 3.95$, $p < 0.05$. Post-hoc analyses were performed to determine what specific differences contributed to the significant multivariate result. Bonferroni t tests revealed that the "masculine" and "androgynous" sex-role identifications had significantly higher CDMSE-SF scores than "feminine" and "undifferentiated" sex-role identifications.

To determine whether there were significant differences by stage of identity development on the main variables, a MANOVA was performed with the four categories of stage of identity development as the independent variable and the CDDQ total and the CDMSE-SF total as the dependent variables. The analysis was not significant, $F (15, 363) = 1.27$, $p = 0.22$.

To determine whether there were significant differences by stage of identity development and one subscale from the CDDQ, "lack of information about self", an ANOVA was performed with stage of identity development as the independent variable and the total for the CDDQ subscale as the dependent variable. It was significant, $F (3, 123) = 3.16$, $p = 0.03$. Bonferroni post-hoc analyses indicated that participants in the first identity category, diffusion, had significantly higher scores on the "lack of information about self" subscale than those in the fourth identity category, achievement. However, this result needs to be interpreted cautiously due to the low internal consistency reliability value of the Diffusion category.

A discriminant function analysis was performed to determine whether scores on the CDDQ and the CDMSE-SF would predict group membership for the career undecidedness category (not at all, slightly, or very undecided) for the 148 participants who answered that question. The discriminant function analysis with the two main variables were predictors and the three categories of career undecidedness as the dependent variable was significant, $\chi 2 (4) = 61.92$, $p < 0.01$. Because there were three groups of participants, t tests were performed to determine which group differences were significant. Those analyses indicated that participants who were "slightly" or "very" career undecided had significantly

higher scores on the CDDQ and significantly lower scores on the CDMSE-SF than those who were "not at all" career undecided. Also, those who were "very" career undecided had significantly higher CDDQ scores than those who were "slightly" career undecided.

A second discriminant function analysis was performed to determine whether scores on the CDDQ and the CDMSE-SF would predict whether participants had changed their career plans or not for the 147 participants who answered that question. The discriminant function analysis was significant, $\chi 2 (2) = 22.08$, $p < 0.01$, indicating that those who had changed their career plans had higher CDDQ scores and lower CDMSE-SF scores than those who had not changed their career plans.

Discussion

The main focus of this study was to examine the relationship of Gati, Krausz, and Osipow's (1996) taxonomy of career decision-making difficulties to career decision-making self-efficacy, sex-role orientation, and stage of identity development. In general, our findings provided support for our hypotheses that those with fewer career decision-making difficulties would have higher career decision-making self-efficacy and would indicate "masculine" or "androgynous" sex-role identification than those with more career decision-making difficulties. Our results provided partial support for our hypothesis that participants at a higher stage of identity development would indicate fewer career decision-making difficulties. Finally, we did two additional analyses and those results indicated that those who were more career-undecided and had changed their career plans had more career decision-making difficulties and lower self-efficacy scores.

The relationship between career decision-making self-efficacy and the taxonomy of career decision-making difficulties as developed by Gati, Krausz, and Osipow (1996) appears complex. Our finding that a significant negative relationship exists between career decision-making difficulties and career decision-making self-efficacy is neither surprising nor unpredicted as extensive research in the area of career decision-making self-efficacy has

resulted in similar findings (e.g., Hackett, 1995; Hackett & Betz, 1992; 1995). The fact that the CDDQ is also related to career decision-making self-efficacy appears to provide support for the construct validity of this instrument. Whether career decision-making difficulties preceded or resulted from low career decision-making self-efficacy is unclear. The finding that students who changed career plans within their first year of university study were more likely to be experiencing continued career decision-making difficulties and lower career decision-making self-efficacy compared to those who had not changed career plans does not clarify this issue. Clearly, the need to change career plans suggests some difficulty with initial career planning but whether or not students who changed career plans are destined to have continued career decision-making difficulties and lower career decision-making self-efficacy likely depends on the new career plan they have constructed and the process used. Students who have not changed career plans may yet need to do so and the impact of the need to change on their career decision-making self-efficacy would be interesting to examine.

It is important to acknowledge that changes in career plans, while sometimes stressful for the student, are neither unusual nor unexpected, especially if we consider career development theory. For example, in Super's (1990) life-span theory, individuals in the exploratory stage of career development examine and consider a variety of occupations before selection of a specific occupational goal. Individuals in this stage also recycle in the early stages of career planning as initial career plans are revised to incorporate new information. Perhaps the challenge to career counsellors therefore is to promote the message that career plan changes are normal and should not be viewed as indicative of a greater underlying problem (e.g., decision-making difficulties). Students accepting this message may be more likely to maintain a positive level of career decision-making self-efficacy while students who do not receive nor believe this message may be more vulnerable to experiencing decreased career decision-

making self-efficacy.

Our finding that students with "masculine" or "androgynous" sex-role identifications had fewer career decision-making difficulties and higher levels of career decision-making self-efficacy than their "feminine" or "undifferentiated" peers was also expected and consistent with previous research. For example, Dawson-Threat and Huba (1996) found that "androgynous" sex-role types had a clearer sense of purpose than those with other sex-role types, which could be related to fewer career decision-making difficulties. One reason for these findings may be related to the personality traits associated with the masculine sex-role. Masculine sex-roles have been associated with assertiveness, competence, and decisiveness (Spence, 1993), and these factors could be related to higher career decision-making self-efficacy. In contrast, feminine sex-roles have been associated with dependence, worrying, and low general self-efficacy (Marsh & Myers, 1986; Ricciardelli & Williams, 1995), which may be related to lower career decision-making self-efficacy.

These results suggest that sex-role identification can be an important factor in the career decision-making process and that the career counselling process could benefit from considering a student's sex-role identity. For example, when conducting career counselling with students with feminine sex-role identifications, counsellors may be well advised to examine the student's self-confidence, decisiveness and assertiveness abilities because these personal attributes may need to be enhanced to allow the student to overcome their career decision-making difficulties. Enhancing these attributes could lead to increased career decision-making self-efficacy.

Our main analysis examining the relationship between stages of identity development, career decision-making difficulties, and career decision-making self-efficacy was not significant. One contributing factor to this non-significant result may have been the uneven distribution of students in the four identity status groups. Although there was not a significant difference by identity status and the CDDQ total, examination of the group means suggested a trend towards those in the achievement category having lower CDDQ scores than those in the diffusion category. This pattern is consistent with developmental theories, including Marcia's theory of identity development, which predict that those who are further along in the process of identity development would experience fewer difficulties with making a career decision because their sense of self is more developed than those whose identity is at an earlier stage of development.

However, our secondary analysis with stages of identity and one subscale total from the CDDQ, lack of information about self, was significant. Specifically, the results indicated that students in the achievement category had significantly lower CDDQ scores than those in the diffusion category. The finding that identity development is an important factor in the career decision-making process is not surprising given that the first stage of career planning often focuses on identification of a student's interests, values, skills, personality preferences, and life goals. Students with a more clearly defined identity would likely have an easier time discussing these personal factors. Assisting with the promotion of student identity development, which is a common component of the mission of university counselling services, could therefore assist in reducing the career decision-making difficulties of students.

One of the greatest challenges in working with students in their first year of university study is the likelihood that their identity will be at an early stage of development resulting in a greater tendency for these students to request "too much" career guidance from identified experts. Several identity development theorists (e.g., Belenky, Clinchy, Goldberger, & Tarule, 1997; Chickering & Reisser, 1993) suggest that individuals at an early stage of identity development are more likely than individuals at latter stages of identity development to not trust their own judgment in decision-making and instead to look to "experts" for answers. Certainly that has been the experience of career counsellors working in our center. It is not uncommon for first-year university students to ask career counsellors and other career service professionals the following questions: "What career should I go in?"; "What courses should I take?"; " What is the best career to enter?" One suggestion for responding to these types of questions is to maintain the image of an "expert" (e.g., indicating that you have expertise in helping students career plan and use career planning resources) when first working with such students in order to facilitate development of a positive counselling relationship. A second suggestion is to employ a simple, straightforward approach to counselling in order to reduce the risk of creating disabling anxiety in the student. Please see Knefelkamp and Slepitza (1976) for additional information on the integration of identity theory into career counselling practice.

One of the applications of our findings is the development of career counselling programming tailored more effectively to the career decision-making needs of first-year students. Specifically, we need to continue to develop specific activities and interventions that increase students' career decision-making self-efficacy, which would be predicted to decrease their career decision-making difficulties. We also need to continue to develop career services targeting each of the career decision-making difficulties as suggested by Gati, Krausz, and Osipow (1996). For example, at our counselling service, we have incorporated some of these ideas into a Career Exploration Workshop, which is the starting point of accessing career services at our counselling service. The Career Exploration Workshop actively involves students in discussions and activities about career myths and beliefs, career planning models, identity development, occupation identification and research, and conflict resolution. Counsellors assist students throughout this process by normalizing the challenges of career planning and by providing supportive feedback. Attendance and participation in the Career Exploration Workshop has been found to significantly increase students' levels of career decision-making self-efficacy (Degen & Ness, 2001).

When considering the implications

of these findings, the limitations of this study need to be considered. One main limitation is the use of self-report methodology without any external corroboration. However, as indicated, the focus of the study was to understand more about these participants' career decision-making difficulties and their perception of the level of their self-efficacy. Another limitation is the correlational nature of the strong negative relationship between career decision-making difficulties and career decision-making self-efficacy. Future research should explore whether or not additional mediating or moderators variables are impacting this relationship. Finally, a third limitation of this study is that we only included first-year university students and therefore these participants were likely in the earlier stages of their career planning process. Future research should include participants prior to their attendance at a post-secondary institution, as well as participants in various stages of their education, to examine the applicability of the Gati, Krausz, and Osipow (1996) model.

In conclusion, this study supported our main hypothesis regarding the interrelationships of several key variables with career decision-making difficulties. In particular, the significant negative correlation between career decision-making difficulties and career decision-making self-efficacy suggests the importance of understanding more about this relationship and other variables that may be related. It is particularly important for future research to examine these variables with students beyond first-year university. At present, we plan to conduct such research and we also plan to begin examining possible path models of career decision-making using the CDDQ and career decision-making self-efficacy measures.

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Research Brief

Measuring Effectiveness in a Clinical Setting

Wes G. Darou
Canadian International Development Agency

Abstract

Measuring outcome has become an important although complex task in today's atmosphere of fiscal restraint. A short and inexpensive instrument, the OQ-45 allows counsellors in clinical settings to undertake such an evaluation. The use of the instrument was demonstrated with a twenty clients in an Employee Assistance Program. The results showed that personal-counselling clients started with problematic levels of symptoms, but rapidly improved to base-line levels. Vocational clients also showed the same type of changes. Both counsellors and clients reported finding the exercise useful.

Résumé

Dans le climat de contraintes budgétaires que nous connaissons aujourd'hui, la mesure des résultats représente un défi important et complexe. Un instrument bref et peu coûteux, le OQ-45, nous donne la capacité d'entreprendre une telle évaluation dans des situations cliniques. Des conseillers et des conseillères ont utilisé l'instrument auprès de vingt clients dans un programme d'aide aux employés. Les résultats ont démontré que les clients du counselling personnel ont commencé par une symptomatologie problématique, mais s'ont rapidement descendu au niveau de base. Les clients qui consultent pour de l'orientation professionnelle ont démontré les mêmes tendances. Les conseillers, autant que les clients, ont indiqué d'avoir apprécié l'exercice.

Measuring Effectiveness in a Clinical Setting

Fiscal restraint has resulted in an increased emphasis on accountability in professional practice (Hiebert, 1997; Flynn, 1997). Health Management Organizations in the U. S., despite the raging controversy, have led the move- ment in responsible counselling and psychotherapy by requiring their suppliers to demonstrate both client satisfaction and client outcome. It is straight forward to measure client satisfaction using an instrument such as the Counsellor Rating Form (Barak & LaCrosse, 1975; available in French from Bachelor, 1987). However, it is more of a challenge to measure outcome. In a clinical setting (as compared to a research setting), it is particularly difficult to monitor success in anything but the most subjective ways (Collins, 2001). Clients may not expect testing, counsellors may be resistant to a greater work load, even the most basic technical advice may not be available, and financial resources will generally not have been put aside for such an activity. However, an instrument has become available to simplify the task of monitoring client outcome: the OQ-45 (Lambert, Hansen, Umpress, Lunnen, Okiishi, & Burlingame, 1996).

The OQ-45 is a 45 item questionnaire that measures client progress in therapy, and is designed to be repeatedly administered during the course of counselling. As pointed out by Howard, Moras, Brill, Martinovich and Lutz (1996), following client progress is a fairly straightforward activity. The key is to have criteria against which the client's progress can be evaluated. The OQ-45 allows a degree of base-line screening and comparison with established norms. It is not intended for diagnostic purposes. The instrument is sensitive to changes, inexpensive, and has high levels of test-retest reliability (r = .84) and concurrent validity (.53 to .88). It is generally administered just before each session, and it takes about five minutes to complete. The instrument measures three aspects of client outcome: symptom distress, interpersonal relations, and performance of social roles (Lambert & Cattani-Thompson, 1996).

As a test of the value of the instrument, three counsellors used it with ten personal counselling clients in an internal Employee Assistance Program in a large office, and with ten vocational counselling clients used as a comparison. The clients were seen for at least five sessions with an average of seven sessions. The clients had an average age of 43 years, and the counsellors held two masters' degrees and one doctorate in appropriate fields.

The results can be seen in Figure 1. The scores for personal counselling begin well above the cut-off, indicating real clinical need. They drop slightly in the next session presumably because the program has early intervention and the clients become even more aware of the presenting problem. By the third session, the scores dropped substantially, and by the last session, they are near the baseline score for the general population.

Interestingly, the vocational clients showed the same pattern of change, beginning slightly below the cut-off line, and improving in three sessions. In our very small sample, clients showed positive change to such questions as, "I am satisfied with my life", "I feel I am not doing well at work", "I feel something is wrong in my mind" and "I feel blue". This supports Bégin's (1998) view that vocational counselling is not just help getting a new job, but a question of reconstructing personal identity.

In practice, using the OQ-45 was found to be a very simple, straight-forward task. Clients in personal counselling found the questions reasonable and the administration unobtrusive. Even in individual cases, the plotted results quickly showed realistic treatment responses. Some counsellors verify key questions such as suicidal ideation, drug use and the ability to work. Viau (1998), in a community clinic, found that many clients showed interest in seeing their results. In two

cases where the clients were slow to respond to therapy, they were shown the results, asked to explain them and then invited to collaborate in redefining the counselling approach.

Overall, the instrument was an efficient way to monitor counselling effectiveness and it gave useful clinical feedback. Howard et al. (1996) point out that there are several advantages to measuring client progress, including judging the effectiveness of treatment, adjusting case loads based on expected treatment and comparing treatments in terms of dose-response relationships. The results were interesting to the clients and the counsellors. Managers appreciated the hard data on client progress when making decisions on funding priorities. The manual is clear and simple to read and understand. The instrument will be even easier to use when a shorter, 30 item version, becomes available. The author has observed that there is occasionally counsellor resistance but that this disappears after they see their first results. The instrument is limited to adult populations and to settings where a paper-and-pencil instrument would be seen as acceptable.

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Figure 1. Results of the OQ-45 in a clinical setting.

Stu Conger
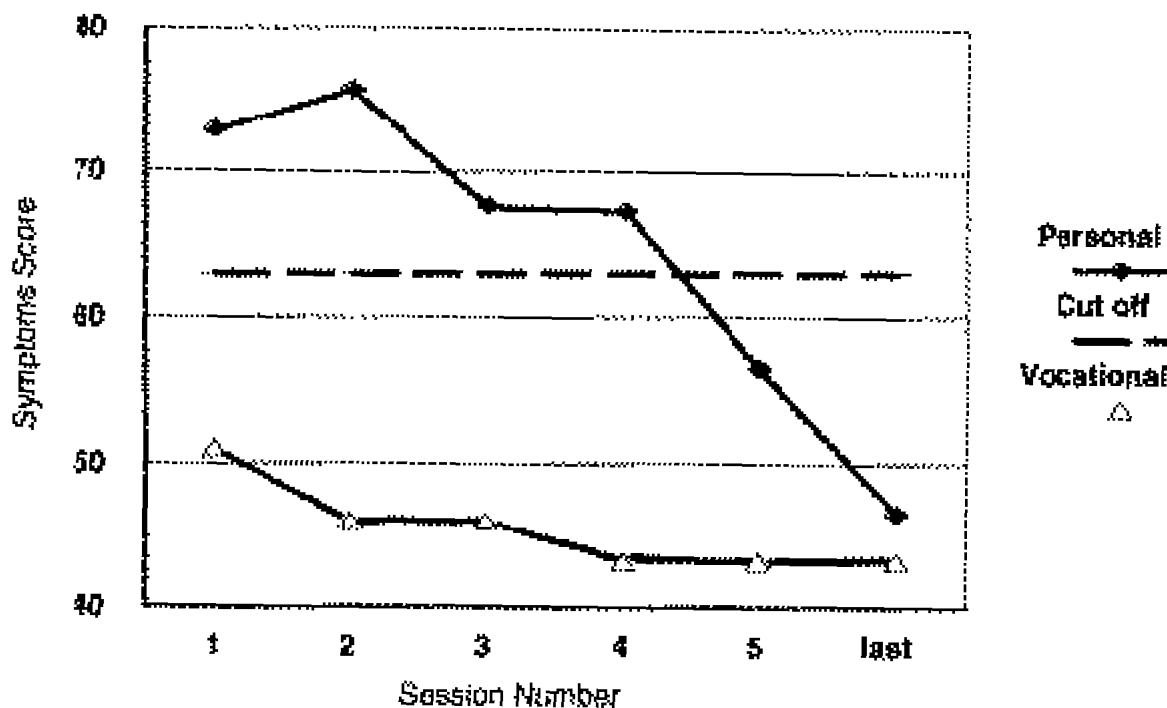
CJCD:

Can you tell me a little about your own career development?

Stu:

Like most career counsellors (I suspect), I did not plan to be a career counsellor. I actually planned to be a clinical psychologist and got my first job as a psychologist in the Ontario psychiatric hospital in London. I was assigned to the after-care department and was responsible for group counselling of patients before discharge, help them get and keep jobs, and counselling them and their families. I enjoyed the work very much, but when I became engaged to be married I realized that I had to find a job that paid better. I was able to get a job as a career counsellor in Canadian General Electric (CGE), which I also enjoyed very much. Subsequently, I worked in human resources departments in Ontario Hydro and R. L. Crain Limited. In 1962, I won a competition to become the Chief of Small Business Management Training in the Federal Department of Industry, and organized a national small business management training program. This gave me a great insight into policy-making, how governments operate and how to promote national programs. In 1965, I was asked by the Federal Department of Labour to organize a national committee to make recommendations on career counselling in technical and vocational education. Gerald Cosgrave drafted the report which the committee unanimously accepted, and which served as a national discussion paper. In 1968, I was appointed Executive Director of Saskatchewan NewStart which was established to create new methods of adult training and counselling. One of our products was Life Skills training. In 1975, I returned to Ottawa to head up the branch of Human Resources Development Canada that was responsible for career and employment counselling and occupational analysis. I

found many talented people in my branch and enjoyed giving them challenges and opportunities. People like Lynne Bezanson and Phil Jarvis were among them. I quickly discovered that provincial guidance consultants had too little contact with each other and therefore, I established the National Consultation on Career Development. Initially, I restricted it to federal and provincial officials, but eventually opened it to all people involved in career counselling. In 1980, I organized a joint conference in Ottawa of the Canadian Counselling Association and the International Association for Educational and Vocational Guidance. I subsequently became a Vice President of the International Association, and President of CCA. I used some of the profits from this conference to create the Canadian Career Development Foundation. I retired from HRDC in 1986, but was soon engaged by the Foundation to establish the Creation and Mobilization of Career Resources for Youth (CAMCRY) which did an enormous amount of good work in the way of career development research and development. I retired again in 1996 devoting most of my time to my wife's (Joyce) care as she had developed terminal cancer. My current involvement in career development is limited to speaking on career issues at conferences of counsellors in Australia, Canada, Italy and U.S.A.

CJCD:

What have been some of the milestones in career development in Canada over the period of your career?

Stu:

There have been too few major milestones in the development of career counselling over the second half of its first century. Perhaps the first major development was the enormous harm done to career counselling when it switched its theoretical base from occupational psychology to counselling psy-

chology. This prompted a great confusion between career counselling and therapy. We are still suffering from this error. There have, however, been some great accomplishments over the past 5 decades including: the creation of a lot of **counselling resources** (the CCDO and now the National Occupational Classification), CHOICES, The Real Game, The Blueprint for Life/Work Designs, career development curricula, career and labour market information websites, etc. The Real Game and the career development courses are a good sign of program-based approach to delivering career development. **Counsellor training** has also improved over the years. I think the greatest impetus was HRDC's competency based training program in employment counselling which trained 2000 counsellors, but also set a curriculum adopted or adapted by both colleges and universities. It is worth noting that although we have a very successful annual conference on career development (NATCON), we do not have a national association of career counsellors. **The organization of the delivery of career counselling** has generally been a disappointment. Some provinces did establish promising career resource centres, but generally career counselling is very badly organized in Canada. In 1980, HRDC adopted a **policy on counselling** which served a useful purpose for several years, but it seems to me that few organizations currently have such a policy and that needs to be rectified - thankfully the Canadian Career Development Foundation is leading a national and international project to promote the formulation of career development policies.

CJCD:

From your perspective, what is some of the current thinking ongoing in the career development community in Canada?

Stu:

I can't really answer this question as I am not now in communication with key Canadians in career development. I would have to question your term "career development community" as I am not sure that there is as much cohesion as your term would suggest.

CJCD:

What do you think some of the challenges for the future will be?

Stu:

I believe that future career development will be influenced by research being done in **neuroscience**. I believe that such areas as decision-making, optimism, risk-taking, etc. are going to be revealed as by-products of our DNA material. These findings will greatly inform the future creation of better career counselling methods. I also think that we will learn a lot from research in **chaos theory**. For example, the principle that we cannot predict the future has great implications for career planning. The idea that we are interacting within ourselves and with others and that new characteristics emerge from these interactions is a welcome promise to re-invigorate trait-factor theory. Only Danielle Riverin-Simard appear to be aware of this. I would hope that there will be better organization structures for the delivery of career development. Governments are currently trying to replace counsellors by **Internet-based** programs, but they currently rely on providing information. I hope they will eventually be able to create intelligent, animated, interactive counselling programs. I would also like to see the development of minimum standards for a career development service. I know that some people are working on minimum standards for counsellors, but I would also like to see standards for the services that schools and agencies should provide. I think such standards would be a great help for counsellors and clients alike. Along with the standards there will be an accreditation body that will give a seal of approval to those services meeting the standards.

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1. Manuscripts should be typed double-spaced on 8 ½ x 11 quality paper. The length of the paper should be 25 to 30 pages.

2. The first page should contain the article title, author's name, affiliation, mailing address and e-mail address to which correspondence should be sent, and acknowledgments (if any). To ensure anonymity in the reviewing process, the author's name should not appear anywhere else on the manuscript.

3. The second and third pages should contain an English/French version of an abstract not exceeding 200 words.

4. Language and format (headings, tables, figures, citations, references) must conform to the style of the *Publications Manual of the American Psychological Association (APA)*.

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9. La soumission d'un manuscrit à la *Revue canadienne de développement de carrière* signifie que cet article n'est pas présentement soumis ailleurs pour fin de publication.

CONTENTS