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## **Abstract**

This paper examines the socio-demographic challenge facing the CF in the 21<sup>st</sup> century and how the alignment of strategies for Human Resources (HR) with the overall Defence strategies will serve as an effective first step towards a response. By examining a cultural transformation that engages the practice of mentoring as a fundamental element in its evolution, it is shown how the basic HR tenet of care for the well-being of the troops can be effectively upheld.

In examining the CF's historical appreciation for the profession of arms, and by considering lessons learned from other government and military applications, this paper goes on to demonstrate the timeliness and viability potential for a mentoring initiative in the CF. By considering the many potential benefits against the hurdles and pitfalls, it is concluded that the mentoring can be an integral measure in the transformational leadership development of the CF.

## 1. Introduction

*“The operational capability of the Canadian Forces is ultimately derived from its people. These young men and women of whom we ask so much, rely on their leaders to look after their well-being and interests.” Canadian Forces Military HR Strategy 2020.*

As the 20<sup>th</sup> century came to a close, the mantra of *people being the most important asset* to the Canadian Forces began to take on a new relevance. In a combined message from the Chief of Defence Staff (CDS) and the Deputy Minister of National Defence, it was emphatically stated that “the Department of National Defence exists only to field the Canadian Forces (CF) in operations.”<sup>1</sup> So committed to the care, support and nurture of the men and women in uniform were the CDS and Deputy Minister that they endorsed and commended a comprehensive military Human Resources (HR) strategy for the future.<sup>2</sup> With a primary purpose to align itself with the CF Defence strategy, the Military HR Strategy 2020 formally established the HR principles, which would serve to define the “how” the CF would look after their people.<sup>3</sup>

This formal alignment of HR policy with the strategic objectives of the CF could not have come at a more opportune time as the federal government re-examined the role it wished its service members to play. In a 1995 review, the Department of Foreign Affairs and International Trade (DFAIT) recognized Canada’s involvement in a rapidly changing world by clarifying its International policy. In response to the declared aspirations of many Canadians and in an effort to meet the challenges of an evolving

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<sup>1</sup>Department of National Defence, *Military HR Strategy 2020, Facing the People Challenges of the Future* (Ottawa: Minister of National Defence, 2002), i.

<sup>2</sup>Department of National Defence, *Military HR Strategy 2020*..., i.

<sup>3</sup>*Ibid*, i.

world, the Federal Government redefined its foreign policy to achieve three key objectives:

- the promotion of prosperity and employment;
- the protection of our security, within a stable global framework; and
- the projection of Canadian values and culture.

DFAIT openly recognized that these objectives were interrelated and mutually reinforcing and the Department of National Defence figured prominently in their achievement.<sup>4</sup>

Notwithstanding the fact that the CF's newly devised strategy for HR management was created sufficiently comprehensive enough to respond effectively to these broad foreign policy objectives, the CF finds itself on the verge of a cultural transformation at the advent of the 21<sup>st</sup> century. The very nature of the role that the military will be called upon to perform in support of Canada's objectives will change dramatically from that of a Cold War posture. With peace making and peace keeping becoming increasingly more prevalent in the CF repertoire, the need for service members to possess a greater skill in diplomacy, openness and understanding of cultural contrasts will become more and more essential. With Canada's increasing propensity to assist coalition forces in the pursuit of world stability in rogue nations, each and every service member will be expected to be more cognizant of the potential ambassadorial nature of their actions. Equally implied in their new posture will be the requirement for a full comprehension of the nuances imbedded in the rules of engagement for their self-

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defence. The ability to understand and appreciate various cultural influences will also factor more predominantly as a requisite skill set for the service member of the 21<sup>st</sup> century.

The attainment of Canada's strategic aims for the 21<sup>st</sup> century represents no small undertaking for the CF in light of the more diverse requirements placed on its service members. The expectations inherent in this cultural shift call for extremely effective leadership: a leadership that has the benefit of experience and wisdom. As if this were not a formidable enough challenge in and of itself, the challenge to produce effective leaders is underpinned by a looming manning crisis of severe proportion. If current retention/loss rates in personnel are not adequately addressed and improved with a view to the long-term requirements, the CF may imperil its ability to fulfill its going Defence commitment.<sup>5</sup> Understandably, there is no easy solution for the CF in the future development of its human resources. Much has been written with respect to the intent of the CF to align themselves more congruently with Canada's International and Foreign Policies. The Military HR Strategy 2020 acknowledges the intent for the CF's HR policies to support these guiding objectives, yet the socio-demographic realities facing the CF's aging workforce pose considerable concerns. It is, therefore, the aim of this paper to propose the implementation of mentoring as an integral measure in the transformational leadership development of the CF.

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<sup>4</sup>Department of Foreign Affairs and International Trade, *Canada In the World – Summary*, available from website [http://www.dfait-maeci.gc.ca/foreign\\_policy/cnd-world/summary-en.asp](http://www.dfait-maeci.gc.ca/foreign_policy/cnd-world/summary-en.asp), accessed 5 January 2004.

<sup>5</sup>Cdr A. Okros for Department of National Defence, *Into the 21<sup>st</sup> Century: Strategic HR Issues – Defence Management Committee (DMC) Discussion Paper* (Ottawa: Minister of National Defence, 1999), 14 (conclusion).

In order to appreciate more fully how mentoring can be a complementary solution to the HR challenge, this paper will lay a conceptual foundation by examining the socio-demographic dilemma facing the CF. The present CF human resource projection will not only be subjected to significantly diminishing numbers but will also be subjected to other significant deterrents. The erosion of overall technological and leadership skills will be highlighted in considering the mounting requirement for more effective HR practices. The expanding role and mandate for the CF corresponds directly to the Canadian public's evolving views on national security and the projection of Canadian values abroad. The complexities surrounding this expanding role will be considered insofar as they impact the HR challenge facing the CF and the proposed applicability of a mentoring solution.

From a historical basis, the CF organizational culture will be explored as it has transformed over the past three decades and evolved into a milieu that is considered extremely well suited for a mentoring initiative. Although the CF studied the profession of arms as long ago as 1972, the evolutionary process encountered some major philosophical hurdles as it strived to incorporate and combine Army, Navy and Air Force's views on leadership. To consider the disparate legacy influences in CF leadership as they set the stage for the response to the 21<sup>st</sup> century HR challenges serves to demonstrate the validity and timeliness of the CF's current strategic response.

As a basic premise, the CF has fully acknowledged this considerable HR challenge and has fully responded with a comprehensive and appropriate HR strategy.

This paper will consider the cornerstone tenets of this strategy and other related documents and will highlight the pressing requirement for a new leadership culture so clearly identified in these documents. The requisite transformational leadership milieu can be best identified by clarifying the refined HR goals and their alignment with Defence strategy. In considering the cultural priorities surrounding the care of the CF service member, this paper will concentrate on the CF's goals of effective succession planning and leadership development reform leading to a viable solution.

Before considering the mentoring solution for a military application, it is first imperative to fully understand what mentoring is and what it is not in a more generic context. Mentoring will be presented as an inexpensive, effective, and proven tool that can be easily implemented. The myriad of directly supported HR goals such as leadership development, talent development, retention and succession planning will be examined as a validation of the significant potential impact of the process.<sup>6</sup> After recounting the historical roots of mentoring, the responsibilities of the mentor and protégé will be fully examined. The fullest potential impact of mentoring can only be realized through the implementation of an effective initiative as opposed to relying on a sporadic and ad-hoc application. The potential benefits that could accrue to the organization are diverse and plentiful. This paper will therefore discuss the criteria to measure the CF's suitability for a mentoring program and some of the aspects of its long-term nature. If mentoring is to be a viable and timely solution for the CF, it is considered very prudent to explore the best practices of others. Recognizing that militaries may not

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<sup>6</sup> Janine E. U. Knackstedt, personal correspondence, 25 March 2004



necessarily adopt “business” practices with any guaranteed degree of relevance, this paper will also consider the recent HR practices within the public sector and more specifically within other military applications. These all offered with a view to finding the most advantageous means by which to formally introduce mentoring to the CF.

By understanding the concept of mentoring and how it has been successfully used in similar organizations, this paper will proceed by studying the CF leadership milieu as it relates to the advent of mentoring. In acknowledging some of the potential pitfalls and hurdles that may befall a CF initiative, this paper will conclude by recognizing and reiterating the potential successes that may await the CF within the milieu of mentoring. Not only will the practice provide a missing link to the organizational goals of the CF, it will provide an opportunity for the infusion of military ethics and the further fostering of the profession of arms. Thus, if the CF hope to successfully address the extraordinary socio-demographic challenges over the next 20 years and beyond, they must deeply ensconce the practice of mentoring to ensure effective succession planning and sound leadership development.

## **2. Identifying the Main Issue**

What drives the necessity for a sound leadership development initiative in the CF is the fact that the role of the CF has changed so significantly over the past decade. With the cessation of the Cold War in the early 1990’s, the entire focus of the CF was driven to change. “In the past there was little need for original thinking in the Canadian military because it had always operated under the umbrella of NATO and NORAD where unity of

doctrine was essential. Today, the senior leadership of the CF must prepare the military for tasks that are much more complex, and for which there is a need for closer participation in the government process that supports the structure and financial support of the CF.”<sup>7</sup> If the official Defence mission of the CF is “...to defend Canada and Canadian interests and values while contributing to international peace and security”<sup>8</sup>, it is only natural that the role of the CF will entail more peace making and peace keeping. With the emergence of more rogue nations and corresponding coalitions formed from the ranks of the willing, Canada’s defence commitment will continue to challenge its service members in an increasingly complex and unique manner.

Because of this challenge, the senior leadership of the CF must recognize that their forces will be called upon to exercise more tact and diplomacy in its 21<sup>st</sup> century missions. While working in matrix organizations, CF members will require different and enhanced skills, knowledge and aptitudes in order to project the Canadian principles successfully. The understanding of various cultures in increasingly diverse coalitions will become more and more vital to ensure Canadian interoperability. “In the face of lethal or non-lethal forces which aim to destabilize society, disrupt commerce or disable communications, the CF may have to become a coalition partner with other national and local agencies to restore calm, reinforce democratic institutions and sustain national will.”<sup>9</sup> The soldier, sailor and airman of the 21<sup>st</sup> century will take on a considerably more

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<sup>7</sup>Department of National Defence, *Canadian Officership in the 21<sup>st</sup> Century (Officership 2020) – Internal Communications Package*, (Ottawa: Chief of the Defence Staff, 2001), 1-4.

<sup>8</sup>Department of National Defence, *Shaping the Future of the Canadian Forces: A Strategy for 2020*, (Ottawa: Minister of National Defence, 1999), 2.

responsible role than that of his Cold War predecessor. “Military personnel would have to serve as soldier-diplomats: projecting safety, protection and rational thinking in times of crisis.”<sup>10</sup> The increased need for sensitivity to evolving cultural norms and expectations will demand a significant investment in training and education for the CF leadership.

Much time and consideration has been given to the enhanced requirements for the CF service member, especially in light of the looming socio-demographic predicament. Brigadier General S.M. Irwin summarized the CF dilemma with great succinctness in three short lines:

“The 90s for the CF were a period of successive budget cuts, downsizing, pay freezes and instability. The CF is only now starting to rebuild its workforce and the challenges are daunting. Economic, demographic and attitudinal changes in the Canadian workforce promise to make recruiting and retention of quality people very difficult.”<sup>11</sup>

This is very much a recurring theme as one reads through the HR related documents pertaining to the CF in the 1990s.

The attitudinal changes in the overall Canadian workforce will influence the CF to undergo a change in values stemming from the external influences of an evolving “Canadian” view. With Canadian society at large being subjected to permeation from

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<sup>9</sup>Okros, *Into the 21<sup>st</sup> Century: Strategic HR Issues ...*, 2.

<sup>10</sup>*Ibid*, 2.

(often-conflicting) global, religious, cultural, and regional alliances, the burgeoning values are most likely to reflect a diverse cultural mosaic. This may well lead to conflicting public opinion with respect to the type and number of military missions the CF should undertake.<sup>12</sup>

This potentially divergent public opinion may also present the CF with unique difficulties for future recruitment. Variations in attitude aside, the CF will be compelled to develop this 21<sup>st</sup> century soldier-diplomat from a dramatically decreasing manning pool. The recruitment from Generation X and the subsequent generation will pose definite challenges as both the public and private sectors vie for a shrinking cohort of the workforce. The ability to maintain a sustainable force structure is at a precipice that is directly influenced by an array of external socio-demographic factors.

“CF personnel, as a group are aging. The result is an extremely unbalanced, top heavy force with older members.”<sup>13</sup> The absolute necessity for viable succession planning is immediate. “Approximately 16,700 personnel, now between 35 and 39 years of age, will reach retirement age between 2015 and 2020, a loss of 29% of our strength over a five-year period. By 2020, 57.4% of those now serving will have reached retirement age of 55.”<sup>14</sup> Given the varied social values of this particular cohort, it is very

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<sup>11</sup>S.M. Irwin, “The CF Human Resource Challenge: Commitment and Leadership” (Toronto: Canadian Forces College National Security Studies Course Paper, 2003), 1.

<sup>12</sup>Okros, *Into the 21<sup>st</sup> Century: Strategic HR Issues...*, 2.

<sup>13</sup>Irwin, “The CF Human Resource Challenge: Commitment and Leadership”..., 5.

<sup>14</sup>*Ibid*, 5.

conceivable that many may not even stay until compulsory retirement age. The function of succession planning must not be allowed to happen randomly.

To further illustrate the appreciation for the socio-demographic dilemma, the projected outlook for the CF must be considered in terms of skill set erosion. Not only will an extraordinary percentage of the current CF force have retired by 2020, but also the exponential advances in technology and communications will leave the inheriting force with a formidable training requirement to develop skills that more appropriately support military operations in the 21<sup>st</sup> century. Despite the onset of revolutionary advances in military technology, a resulting decrease in operational tempo is not reasonably anticipated. It can also be argued that the advancement in technology, paired with information dominance, may give the CF a relative strategic advantage in comparison to rogue nations, increasing the pressure and requirement for professionalism and irreproachable ethical behaviour. It is, therefore, in the advent of an expanding role, a shrinking and not easily replaced workforce and a skill set erosion, that the CF finds its exigencies for a systematic succession plan and a revitalized leadership development plan.

### **3. An Historical Perspective on the CF Profession of Arms**

The advent of a new millenium and its requirement for revised conduct is not the first occasion the CF has felt compelled to examine its profession of arms. Ironically, some of the basic findings and recommendations that came out of an intensive 1972 HR study are very similar to those of Military HR Strategy 2020. It is, perhaps, the more

stoic responses to the 1972 Study that may have predisposed the thinking of the CF leadership to a mindset that was not conducive at the time to the introduction of a major cultural reform.

It was as a result of discussions at a CDS Study Seminar 25 – 27 June 1970, that the CDS ordered CDS Directive Study S12/70 indicating the need for a comprehensive study of the military profession in modern Canadian society.<sup>15</sup> The study was approached by a working group of individuals from the Canadian Defence Education Establishments (CDEE) as an examination of the military in Canada over the next twenty years in an attempt to determine the changes, which might be required in the development of military personnel. The guidelines with respect to the scope and time frame of the project bore an uncanny resemblance to the project that would yield Military HR Strategy 2020. What came to be called, the “1972 Study on Professionalism in the Canadian Forces”, examined the new roles of the CF as dictated by both the pursuit of national aims and the traditional military roles. Therefore, in addition to such basic factors as general education, selection criteria, professional education, environmental and classification training, it was important to consider the new requirements dictated by those pressures exerted by Canadian society that would affect the military profession in the future.<sup>16</sup> In a virtually timeless account, the directive stated that the *raison d’être* of a professional military force was to apply or threaten to apply force on behalf of the state. The corollary to this statement recognized that any follow on policies should emphasize

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<sup>15</sup>Department of National Defence, *Report of Study on Professionalism in the Canadian Forces: In accordance with CDS Directive S12/70* (Ottawa: Chief of Defence Staff, 1972), 2.

the development of qualities, capabilities and characteristics required to fulfill the foreseen quasi and non-military roles because these were the areas of greatest change from the past.

As far back as 30 years ago, the CF had avidly pondered and examined the strategies that would drive its HR planning and policies. The challenges then, as they are today, were to align the HR strategies with the changing strategic aims of the country and the changing role of the CF in the fulfillment of its mandate. The 1972 Study on Professionalism in the Canadian Forces wrestled with concept of leadership development and determined that “flexibility toward leadership methods and styles should be encouraged.”<sup>17</sup> It went so far as to say that “this is a fundamental and sensitive subject which represents a whole study area in itself.”<sup>18</sup> Unfortunately, no detailed conclusions were reached. Most unfortunately, the delinking of the subject of leadership methods from the study on professionalism caused the study and the resulting mindset to retain some biases that would ultimately cause the CF to not consider methods such as mentoring as a viable option for years to come.

Inasmuch as the 1972 Study on Professionalism in the Canadian Forces similarly sought to gain clarity on a HR strategy for the following 20 years, the study differed from the later Military HR Strategy 2020 to a great extent in some of its primary guidelines and assumptions. In distinguishing between its officers and non-commissioned members,

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<sup>16</sup>Department of National Defence, *Report of Study on Professionalism...*, 4.

<sup>17</sup>*Ibid*, 8.

the study concentrated mainly upon officers, defining them as “the professional cadre”. It did recognize that officers and non-commissioned members should not be considered apart from each other in many aspects of the military as a calling; however, the non-commissioned members would be dealt with to a much lesser extent in the study. The study assumed that there was a fundamental difference with respect to loyalty. It further declared that the levels of feelings of loyalty and commitment of servicemen vary with individuals and by some extent by rank. It also assumed that some personnel did not recognize a loyalty beyond that to a unit or even beyond themselves. The remedy to this assumption was to be the development of a broader set of guidelines that stressed identity at the levels of ethnic origin.<sup>19</sup> The complementary leadership piece to this conclusion recognized that approaches to leadership must be assessed by the CF and adapted as necessary to accommodate changing trends resulting from technological, educational and sociological advances. The study went on to say that the qualities required in the non-commissioned members remained unchanged in that they must be skilled, resourceful, *disciplined and restrained*. “The Armed Forces must, in short, ensure that the leadership approaches and modes of discipline are appropriate.”<sup>20</sup>

The recommendations of the study may have been provocative for their time; however, with the benefit of hindsight they appear to be somewhat piecemeal and staccato in their application. The resulting void left by acknowledging but not addressing leadership development gave way to the more conventional authoritative approaches.

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<sup>18</sup>*Ibid*, 8.

<sup>19</sup>*Ibid*, 14.



The extent to which succession planning was considered in the 1972 study, consisted of nothing more than an active interest in second career initiatives and training for the non-commissioned members who were nearing the end of their chosen engagement period. Notwithstanding the immense merit associated with the legacy systems of leadership, the die had been cast to influence the pre Military HR Strategy 2020 environment in the belief that a service member's supervisor was the best and only influence in the development of his career. The organizational culture of the time called for strong and authoritative leadership. As the CF had only recently been unified, the propensity of each service was to carry forward, if not cling to a way of leadership that had best suited them since their respective inception. The broader concept of CF wide leadership development was recognized in the 1972 Study on Professionalism as something that warranted the encouragement for a continuing study, yet the study offered a pointed finale of: "No detailed recommendations (for leadership development) will be attempted here."<sup>21</sup>

The extent to which the 1972 Study on Professionalism in the CF predisposed the thinking of the organizational culture towards leadership development is very much open for interpretation. The retrospective appreciation serves only as an illustrative background for comparison to the guidelines and direction that will be shown to exist in Military HR Strategy 2020. Despite the apprehensive start that the CF had in examining its profession of arms, the CF has found remarkable clarity and purpose in responding to the 21<sup>st</sup> century's HR challenges through a carefully considered process of strategic alignment.

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<sup>20</sup>*Ibid*, 49.

#### 4. Examining the CF's Strategic HR Response

*Look after our people, invest in them and give them confidence in the future.*<sup>22</sup>

By building on the assessment embodied in the 1994 Defence White Paper, considering the needs and expectations of major stakeholders, assessing the institution's strengths and weaknesses, and analyzing the emerging defence issues, the Department of National Defence carved out its Defence Strategy 2020 in June 1999.<sup>23</sup> This represented a significant milestone on which a comprehensive and cohesive CF Human Resources strategy could be established. In 2002, the CDS and the Deputy Minister of Defence released Military HR Strategy 2020 in which they formally established the CF strategic HR principles "which define "how" we look after our people."<sup>24</sup> "As a plan for the future, this strategy represents the integration of the concern for our people within the larger DND/CF strategic process."<sup>25</sup> The commitment to transformation was, thereby, formally established.

The HR leadership of the CF recognized and acknowledged that the fulfillment of the policies in Military HR Strategy 2020 represented a tremendous challenge and responsibility. The proposed revolutionary approach to transformation would require the

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<sup>21</sup>*Ibid*, 67.

<sup>22</sup>Department of National Defence, *Military HR Strategy 2020*..., 1.

<sup>23</sup>Department of National Defence, *Shaping the Future of the Canadian Forces*..., foreword.

<sup>24</sup>Department of National Defence, *Military HR Strategy 2020*..., i.

<sup>25</sup>*Ibid*, ii.

leadership to “...become more innovative and proactive.”<sup>26</sup> The mission was clearly proclaimed, “to develop and implement HR plans, policies, and programs to recruit, develop and retain people to effectively support the CF in all operations it is asked to perform.”<sup>27</sup> In keeping with the strategic alignment theme, it identified the HR requirement as threefold: serving the defence mission, conforming to social expectations, and supporting the social contract.<sup>28</sup>

In essence, the Military HR Strategy 2020 strategy set out a road map that would span the next two decades and refocus its efforts on the revitalization of the profession of arms. Much care and attention was placed on the ethical principles upon which the military ethos is nurtured. These principles were stated as: serve Canada before self, obey and support lawful authority, and respect the dignity of all persons.<sup>29</sup> In the declaration of this creed, the foundation had been set for a revolution in leadership development and succession planning: a foundation that would bind together all those who act on behalf of the Government of Canada.<sup>30</sup>

Not surprisingly, there were a number of integral HR principles developed in support of the Military HR Strategy 2020 strategy. Although the strategy document

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<sup>26</sup>*Ibid*, 2.

<sup>27</sup>*Ibid*, 3.

<sup>28</sup>Franklin C. Pinch, “Change and Human Resource Management in Defence,” *Canadian Defence Quarterly* Vol. 27, Iss 3 (Spring 1998): 2.

<sup>29</sup>Department of National Defence, *Military HR Strategy 2020...*, 3.

<sup>30</sup>*Ibid*, 3.

maintains that principles are not intended to be followed in a formulaic fashion, it does hold the principle of leadership responsibility as the first and foremost. The primacy of this principle signifies a transformation in leadership development that refocuses the CF leadership on their accountability to those whom they lead.<sup>31</sup> Its intent was clearly articulated by stating: “CF personnel policies will be designed to support the exercise of sound leadership at all levels, to ensure that respect and dignity are accorded to all CF members, and to promote unit cohesion and esprit de corps within the CF.”<sup>32</sup> In recognizing the transformational nature of this strategy for its leadership, Military HR Strategy 2020 was adamant in stating that policies and programs must be designed to enable leaders to develop and maintain the commitment, capabilities and well-being of their people.<sup>33</sup>

So as to further emphasize this underlying need to develop the leadership in support the HR vision, a complementary strategic document, called Canadian Officership in the 21<sup>st</sup> Century (Officership 2020) was developed with the aim of guiding CF officers in meeting the leadership challenges and demands anticipated for 2020.<sup>34</sup> Once again it was acknowledged that the Cold War tactical approach to leadership would not adequately serve the multidimensional demands embedded in the HR strategic vision for the next two decades and beyond. Leadership in its general form may be defined as “directly or indirectly influencing others, by means of formal authority or personal

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<sup>31</sup>*Ibid*, 4.

<sup>32</sup>*Ibid*, 4.

<sup>33</sup>*Ibid*, 4.

attributes, to act in accordance with one's intent or shared purpose."<sup>35</sup> The Officership 2020 strategy calls for a more holistic application of the leadership lessons learned through past and current operations.<sup>36</sup> The common binding thread that winds its way throughout the Officership 2020 strategy is the immediate and absolute necessity for the establishment of a new leadership culture: a culture that champions the belief that the "operational capability of the CF is ultimately derived from its people."<sup>37</sup>

Given the conditions being so seemingly predisposed to a cultural renaissance to transformational leadership development, what should the future leadership cultural milieu look like and what is it to do? To first understand the meaning of transformational leadership in its more academic form, the definition provided by the prominent scholar and author, Dr. Peter G. Northouse is well suited to this CF application.

"Transformational leadership is a process that changes and transforms individuals. It is concerned with values, ethics, standards, and long term goals."<sup>38</sup> As a formative portion of the current curriculum at the Canadian Forces College (CFC), Dr. Northouse's insightful approach explains that "transformational leaders set out to empower followers and nurture them in change. They attempt to raise the consciousness in individuals and to get them to transcend their own self-interests for the sake of others."<sup>39</sup> Transformational

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<sup>34</sup>Department of National Defence, *Canadian Officership in the 21<sup>st</sup> Century*..., ii.

<sup>35</sup>Karol W.J. Wenek of the CF Leadership Institute, *Defining Leadership – Discussion Paper 2003* (Kingston: Royal Military College, 2003), 36/37.

<sup>36</sup>*Ibid*, 1-19.

<sup>37</sup>Department of National Defence, *Military HR Strategy 2020*..., i.

<sup>38</sup>Peter G. Northouse, *Leadership – Theory and Practice – Second Edition* (Thousand Oaks: Sage Publications Inc., 2001), 131.

leadership can be described further in terms of the leader's effect on followers. A transformational leader "...lifts followers to their better selves."<sup>40</sup> Leaders transform followers by making them more aware of the importance and value of task outcomes and by activating their higher-order needs. As a result of this transformational influence, followers feel trust and respect toward the leader, and they are motivated to meet and often exceed the organizational goals and fulfill service requirements. Mentoring ties in very well with this dynamic as it provides a conduit through which more specific and individualized interaction might take place.<sup>41</sup> Leadership in the CF profession of arms for 21<sup>st</sup> century all of a sudden becomes a far more all-encompassing undertaking. Transformational leadership seeks to raise the consciousness of followers by appealing to higher ideals and moral values.<sup>42</sup> "To serve Canada before self responds to the trust bestowed upon the profession by Canadians and sometimes calls for the highest degree of self-sacrifice."<sup>43</sup>

Inasmuch as the future demands a transformation in leadership development, the revitalized responsibility for care and development of subordinate CF service members takes on a new priority. This synergistic theme pervading the strategic level HR documents acclaims the essentiality of the health, welfare and spiritual well being of all

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<sup>39</sup>Peter G. Northouse, *Leadership...*, 144.

<sup>40</sup>William D. Hitt, *Ethics and Leadership – Putting Theory into Practice* (Columbus: Battelle Press, 1990), 137.

<sup>41</sup>B.M Bass, *Leadership and Performance Beyond Expectations* (New York: Free Press, 1985)

<sup>42</sup>Gary Yukl, *Leadership in Organizations – 3<sup>rd</sup> Ed* (Inglewood Cliffs: Prentice Hall, 1994), 351.

<sup>43</sup>Department of National Defence, *Military HR Strategy 2020...*, 4.

military personnel.<sup>44</sup> Imbedded in the strategic principles that guide this mandate are commitments to the professional development and continuous improvement of our service members. Recruiting initiatives will be developed with the goal of making the CF an employer of “choice”. By developing initiatives that strengthen the social contract, retention goals will be enhanced through themes of well being, professional development, and most importantly, internal communication.<sup>45</sup> At the brink of a diminishing work force, the inherent need to successfully pass skills and knowledge to the legacy force becomes penultimate. “Broad communication is required to tap the knowledge of the organization and external expertise, leading to informed decision making. Effective and timely communication is a key facilitator of meaningful feedback.”<sup>46</sup> Proper succession planning thrives in an environment of communication and feedback. “A lack of appropriate consultation will hamper innovation and continuous improvement efforts.”<sup>47</sup> An open and honest environment of communication is the conduit to proper care and development of subordinate CF service members.

Clearly, recent strategic thinking in the CF has synthesized the required principles and solutions while bearing in mind the impending socio-demographic dilemma. The strategic level documents have poised the CF for an effective implementation of HR policy to foster a leadership transformation and to promote succession planning. As Military HR Strategy 2020 purports, it is not intended to be formulaic prescription. It is

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<sup>44</sup>*Ibid*, 5.

<sup>45</sup>Department of National Defence, *Military HR Strategy 2020...*, 21.

<sup>46</sup>*Ibid*, 6.

intended to guide HR thinking in the full recognition that uncertainty has the effect of the key to success from the optimal strategy to the most skillful strategy process.<sup>48</sup> In consideration of the limited resources likely to be made available to the CF in the 21<sup>st</sup> century, the efficiency of the transformational process will play as important a measurement for success as the effectiveness. The broad-brush strategy has been developed and it is now up to the practitioners to explore the HR possibilities at an operational level. The campaign plan that answers the “how to” questions stemming from the HR strategy is most deserving of innovative and flexible thinking.

## **5. Understanding the basics of the mentoring solution**

As is often the case in solving any great dilemma, some of the best solutions may well be of the tried, tested and true variety that rest just “under our noses”. In this vein, it is interesting to note that the practice of mentoring has been an extremely effective means of communication and development since the time of Greek mythology. “Prior to departing for the Trojan Wars, Homer’s Odysseus asked his trusted friend, Mentor (Athena) to be the tutor of Odysseus’ son Telemachus until Odysseus returned. Mentor accepted and was given total responsibility that Telemachus received all the education and guidance required to assume the head of the household in case Odysseus failed to return from Troy.”<sup>49</sup> For the purposes of this paper and to place things in a 21<sup>st</sup> century context, the definition of mentoring best suited for this application comes from the writings of Harold E. Johnson in his book entitled Mentoring for Exceptional

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<sup>47</sup>*Ibid*, 6.

<sup>48</sup>*Ibid*, 1.



Performance. He defines mentoring as a "... means to facilitate, guide and encourage continuous innovation, learning and growth to prepare the business (organization) for the future."<sup>50</sup> Notwithstanding the fact that a good deal of the literature available on the topic of mentoring comes from a business context, the military application finds definite parallels in its pursuit of a strategic aim. Mentoring in a Canadian military application is definitely not heavily trodden ground but represents an extremely flexible and innovative solution in keeping with the CF HR strategy challenge.

In order to prove that mentoring is an effective, efficient and proven tool for the CF to achieve its goals, it will first be essential to understand the proposed mentoring concept within a generic context. The proposed practice of mentoring is to be identified as an integral component of leadership.<sup>51</sup> The process of mentoring describes a formal relationship and communication process between a mentor and a protégé. In a broad sense, it is a conscious pairing of a more skilled/experienced person (mentor) with a lesser skilled/experienced person (protégé) for the purpose of having the lesser skilled party grow and develop specific competencies.<sup>52</sup> In an effort to facilitate a more rudimentary understanding of the mentoring process, it must be clarified that both the mentor and the protégé have very different and distinct responsibilities in the proposed

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<sup>49</sup>Capt Michael E. Uecker, "Mentoring and Leadership Development in the Officer Corps of the United States Air Force,"(master's thesis, Air Force Institute of Technology), 2.

<sup>50</sup>Harold Johnson, *Mentoring for Exceptional Performance* (Glendale, Griffin Publishing 1997), 5.

<sup>51</sup>Janine E. U. Knackstedt, "Organizational Mentoring: What About Protégé Needs?," (Doctoral thesis, University of Waterloo, 2000), 3.

<sup>52</sup>Margo Murray, *Beyond the Myths and Magic of Mentoring – How to Evaluate an Effective Mentoring Process* (San Francisco: Jossey-Bass Inc., 2001), xiii.

CF process. Although not an all-inclusive list, mentors would be responsible to carry out the following functions:

- act as a source of information on the mission and goals of the organization;
- offer insight into the organization's philosophy of human resource development;
- tutor effective skills, effective behaviour, and how to function in the organization;
- coach activities that add to experience and skill development;
- serve as a confidant in times of personal crisis and problems;
- assist the protégé in plotting a career path;
- meet the protégé at agreed time intervals for feedback and planning;
- maintain the integrity of the relationship between the protégé and the natural supervisor/Commanding Officer; and
- agree to a no-fault conclusion of the mentoring relationship if (for any reason) the time was right.<sup>53</sup>

By the same token, protégés would require the following characteristics:

- willingness to assume responsibility for his or her own growth and development;
- assessed and self-perceived growth potential;
- a record of seeking challenging assignments and new responsibilities; and
- positive receptivity to feedback and coaching.<sup>54</sup>

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<sup>53</sup>Murray, *Beyond the Myths and Magic of Mentoring ...*, 14.

<sup>54</sup>*Ibid*, 15.

The benefits of a facilitated mentoring initiative can be manifold. Over the long term, mentoring contributes to leadership development, professional development, career development, and personal development. When a mentoring initiative has been facilitated effectively, discernable benefits are derived by the protégé, mentor and the organization alike.<sup>55</sup> In the interest of clarity, the concept of facilitated mentoring can best be defined as: “...a structure and series of processes designed to create effective mentoring relationships; guide the desired behavioural changes of those involved; and evaluate the results for the protégés, the mentors and the organization.”<sup>56</sup>

Although the results and benefits of a facilitated initiative are evaluated for the three entities of the mentoring triad, the amassed benefit to the protégé may be manifold. Numerous research studies ranging from 1984 to 2002 have conclusively proven that a protégé can reasonably expect to derive the following benefits:

- Ability to become more effective leaders and display earlier organizational socialization;
- a greater ability obtain valuable information otherwise not available through the formal channels;
- greater access to influential and senior people;
- higher levels of managerial and technical skills;
- increased productivity;

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<sup>55</sup>Knackstedt, “Organizational Mentoring”..., 2/3.

<sup>56</sup>Murray, *Beyond the Myths and Magic of Mentoring* ..., 5.

- higher career satisfaction;
- increased self confidence and self esteem; and
- set higher personal standards and have acquired a code of ethics.<sup>57</sup>

The mentor in a facilitated relationship gives of himself or herself, yet can also reasonably expect to accrue a number of benefits in the process. Studies have demonstratively proven that a mentor can:

- derive an increased sense of competence and feelings of confidence in his or her abilities;
- gain in respect among his or her peers and superiors;
- find greater job satisfaction, motivation, and enhanced leadership skills; and
- find the experience to be creative, satisfying, and rejuvenating.<sup>58</sup>

“Mentoring enables the mentor to contribute to the next generation by passing on a legacy while learning valuable information about junior personnel and new technology from the protégé.”<sup>59</sup>

By no means least in the equation of benefit distribution, the CF also stands to accrue the following benefits from an effective initiative:

- earlier organizational socialization of the more junior members;
- decreased turnover;
- increased productivity;

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<sup>57</sup>Knackstedt, “Organizational Mentoring”..., 4.

<sup>58</sup>*Ibid*, 4/5.

- better educated/trained service members; and
- effective management and succession planning.<sup>60</sup>

An organization such as the CF has a great deal to gain from the implementation of a facilitated mentoring initiative, especially as it has been proven that mentoring can be a key resource during times of major corporate change.<sup>61</sup>

Arguably, most of us have been in some sort of quasi “mentoring” situation at some point in our lives. Most of us are familiar with the importance of coaches, teachers, and sponsor/role models in western society. These are all very valuable functions that have contributed substantially to the social fabric of our modern day society. By means of comparison, these functions tend to focus on a relatively short-term specific benefit and are not necessarily guided by an overall organizational strategy. Mentoring incorporates many, if not all of the rote processes found in these functions, however, it provides a more comprehensive long term, mutually beneficial approach. For mentoring to be truly effective in an organizational context like the CF, it cannot merely happen on an ad-hoc informal basis. To reap the greatest benefit, it must be well orchestrated through a facilitated process, giving due care and consideration to the needs of the protégé, the role of the mentor, and the overall HR strategic goals of the organization. When implemented correctly, mentoring is not a quick fix, a fad, or an experiment. “Success does not happen by chance. Success requires a well-executed strategy.

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<sup>59</sup>*Ibid*, 5.

<sup>60</sup>*Ibid*, 5.

<sup>61</sup>*Ibid*, 5.

Mentoring facilitates that strategy.”<sup>62</sup> As the strategy guides the actions of the CF leadership, the function of mentoring may be thought of as an integral part of transformational leadership development process.

## **6. Considering the Lessons Learned by Others**

The need for strong leadership in replacing an aging workforce is not a dilemma faced by the CF alone. The Public Service of Canada overall is faced with similar HR challenges as the 21<sup>st</sup> century begins to unfold. In 2002, the Treasury Board of Canada released a document entitled “Succession Planning for Corporate Knowledge Transfer – A Guide for Managers and Human Resource Specialists”. The opening message from the Secretary of the Treasury Board readily acknowledged that there was an urgent need for a coordinated response to viable succession planning. In his message he warns:

“...a number of factors, such as shift to a value-based Public Service, financial restraint, and rapidly changing technology are affecting the way the Public Service of Canada carries out its mission. Among these is the fact that the Public Service is aging. Many employees with valuable corporate memory are in a position to retire within the next few years.”<sup>63</sup>

Not unlike the leadership of the CF, he recognizes that, “their imminent departure poses a challenge in terms of the potential loss of experience and expertise this will entail.

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<sup>62</sup>Johnson, *Mentoring for Exceptional Performance...*, 13.

Meeting this a shared responsibility.”<sup>64</sup> The guide subsequently offers specific examples of knowledge transfer and organizational transition strategies. The primary component of the guide is the National Mentoring Program Strategy the purpose of which is to act as a national mentoring repository of best practices and tools on learning and career development.<sup>65</sup>

Equally challenged by the looming socio-demographic dilemma, it was forecast in the United States that “the federal government will face a crisis of competence when fifty-seven thousand (civil servants) hit the optional retirement age of fifty-five in the year 2002.”<sup>66</sup> There remains an urgent need for succession planning and management development, particularly in the knowledge-based organizations. “Whatever the stimulus, the interest in careful planning of the mentoring process is growing all over the world.”<sup>67</sup> The lessons learned by the corporate community may have some value to the CF in its formulation of a facilitated mentoring initiative, however, the United States’ military has established a secure foothold in the practice and has produced an initial offering of literature with respect to its best practices. A synopsis of the main points derived from this literature is as follows:

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<sup>63</sup>Treasury Board of Canada Secretariat, *Succession Planning for Corporate Knowledge Transfer – A Guide for Managers and Human Resource Specialists*, (Ottawa: Queen’s Printers for President of the Treasury Board, 2002), message from the Secretary.

<sup>64</sup>Treasury Board of Canada Secretariat, *Succession Planning for Corporate Knowledge Transfer...*, message from the Secretary.

<sup>65</sup>*Ibid*, 4.

<sup>66</sup>Murray, *Beyond the Myths and Magic of Mentoring ...*, 26.

<sup>67</sup>*Ibid*, 29.

- mentoring is based on the belief that the essence of military culture is described as an amalgam of values, customs, traditions, and their philosophical underpinnings that, over time, has created a shared ethos;<sup>68</sup>
- “Mentoring achieves success in leader development through the development of non-threatening, long term relationships forged by mutual respect and a genuine desire to grow as an individual and professionally;”<sup>69</sup>
- militaries must take into consideration their unique constraints and thereby be willing to deviate from a more classical connotation of mentoring;
- although mentoring should be more of an inclusive process than an exclusive process, the initiative should clearly spell out the responsibilities of both the mentor and the protégé. This will allow the senior officers to avoid the overwhelming responsibility to mentor all subordinates in an equitable manner;
- productive chemistry in a mentor-protégé relationship can not be mandated by doctrine;
- a mentoring initiative must receive nourishment from its environment; for the military, nourishment comes in the form of means (resources such as money, manpower, machines and materials);
- workplace diversity enhances organizations’ ability to overcome obstacles by introducing alternative views and innovations;

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<sup>68</sup>Center for Strategic and International Studies, *American Culture in the Twenty-First Century: A Report of the CSIS International Security Program*, (Washington: The CSIS Press, 2000), XVIII.

<sup>69</sup>Merrill Anderson-Ashcraft, “Mentoring Perceptions in the Military,” (Strategy Research Project, U.S. Army War College, 2002), 1.



- mentors should not necessarily be selected based on seniority but based on areas of expertise;<sup>70</sup>
- mentoring should be completely voluntary; and
- “The ability to accept and inspire others to change...is perhaps the true essence of the successful soldier.”<sup>71</sup>

The United States’ military has gained many valuable lessons since it introduced mentoring in a White Paper on Defence in 1995. Implemented with a similar organizational goal of enhancing the development of future leaders in the Army, Navy Air Force and Marine Corps, each service has had somewhat differing experiences in its application. The US Navy conducted a “Mentoring Experience Survey” in 1996 and determined that mentoring had directly contributed to the professional development in the case of the majority of the respondents.<sup>72</sup> In 1999, the US Air Force officially expressed its objective to have mentoring help with the retention of pilots and enlisted technicians. Also in 1999, senior representatives of the US Army engaged mentoring as a more personal approach to training and a critical element in leader development. Of the collective lessons learned, studies have shown that the one of the biggest dissatisfiers, according to practitioners of US military mentoring, was the lack of clarity with respect to the goals of the mentoring initiative and the procedures guiding it. The resulting recommendation to this observation was that strategic leaders and sponsors needed to

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<sup>70</sup>Merrill Anderson-Ashcraft, “Mentoring Perceptions in the Military...”, 33 - 36.

<sup>71</sup>LGen Richard G. Trefry, “Soldiers as Warriors, Warriors as Soldiers,” *Joint Processes and Land Power Development 1*(Carlisle Barracks: US Army War College, 2001), 1.

<sup>72</sup>Merrill Anderson-Ashcraft, “Mentoring Perceptions in the Military...”, 1

more clearly define the mentoring initiative with the goals, strategies and procedures written in the doctrine.<sup>73</sup> As a follow on to this recommendation, concern was expressed over the monitoring and measuring of the effectiveness of a given mentoring initiative. Where organizational goals are not clear, the ability to measure the success of a mentoring initiative may be severely reduced. The assessment of effectiveness for an initiative that enhances the development of future leaders may be more long term in its measurement and may be better measured by the satisfaction of the protégé in the short run. Finally the requirement to provide training once an initiative is clearly defined is seen as essential to its success. The function of being a mentor may not come naturally to all who are sought out to perform in the role. The establishment of a training program including the use of a training Internet site is essential to the sustainment of the initiative as the trainees may be widely dispersed and in small geographical concentrations.<sup>74</sup>

Not unlike the CF, the United States' Military espouses the basic tenet that every leader is responsible for creating a learning environment. In the development of their facilitated mentoring initiative, it was acknowledged that mentoring had immense potential as a leadership development tool, and it was therefore the further responsibility of every US military leader to be a mentor. Although seemingly ironic, the majority of potential drawbacks that are associated with mentoring initiatives are most prevalent when the programs are extremely formalized and structured. A case in point for this phenomenon is found with the United States Air Force. In 1996, General Ronald R.

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<sup>73</sup>*Ibid*, 30.

<sup>74</sup>*Ibid*, 31.

Fogleman, US Air Force Chief of Staff, issued Policy Directive (AFPD) 36-34, which set out to “formally establish mentoring in the Air Force and provide guidance for its implementation.” The guidance formally directed that “mentoring is a fundamental responsibility of all Air Force supervisors.” Consequently, the USAF proceeded to designate every supervisor with mentorship duties, despite the fact that research at the time indicated that the most effective mentor was not the first or second level supervisor. A number of subsequent USAF studies have concluded that there was considerable dissatisfaction with this forced mentor-protégé assignment and as such the program yielded relatively few benefits in its execution.<sup>75</sup> The studies found that supervisors, in many cases, had infringing time constraints and were often unable to provide the necessary guidance. In some observed instances, the subordinates did not share good relationships with their supervisors and therefore experienced an environment less than conducive to effective mentoring.

Other problems that stem from having the boss as a mentor have been cited in the more recent literature on mentoring. Studies conducted in 1997 concluded that the more levels higher in the organization mentors are than their protégés, the more able they are to offer career planning and advice unfettered by the immediacy of day to day operations.<sup>76</sup> This is also confirmed by the foremost academic authorities. In a 1998 article entitled Dysfunctional Mentoring Relationships and Outcomes, renowned author T.A. Scandura explains that a supervisor mentor is in a position of power over the protégé and therefore

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<sup>75</sup>Kristopher A. Singer, “An Assessment of Mentoring Functions and Barriers to Mentoring,” (Master’s thesis, US Air Force Institute of Technology, 1999), 2.

can exercise control over assignments and influence performance ratings or promotion possibilities. In some instances a conflict of interest situation may arise wherein the supervisor may not want a highly talented individual to leave his or her staff for further career development and/or advancement. These possibilities can potentially alter the relationship from the optimal, desirable or traditional dynamics found in a true mentoring relationship.<sup>77</sup>

These best practices and lessons learned from the Canadian Public Sector and the US Military will be extremely useful for the CF in devising a facilitated initiative in pursuit of the true mentoring relationship. With a distinct similarity, the CF espouses the view that the profession of arms shares an ethos steeped in culture and values. The diversity and challenges facing the CF bode well for the implementation of a well-defined, expertise driven mentoring initiative. The key to understanding how best to transport these practices to a CF application is to consider the current CF temperament and disposition for mentoring.

## **7. The Current CF Disposition for Mentoring**

When considering the socio-demographic factors facing the CF and the non-traditional HR strategies that have been established to address the dilemma, it is conceivable that the proposed transformational environment might well be cause for considerable stress and trepidation within the leadership. Perhaps contrary to common

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<sup>76</sup>Bill Wild, *Understanding Mentoring: Implications for the Canadian Forces*, Report prepared for the Canadian Forces Leadership Institute (Ottawa: Human Resource Systems Group Ltd, 2002), 23.

<sup>77</sup>Bill Wild, *Understanding Mentoring ...*, 23.

thinking, this underlying and predominant dynamic bodes well for the implementation of a facilitated mentoring initiative. By considering the service members' needs as a primary thrust in establishing a CF mentoring initiative, it is important to note that studies have proven that mentors can substantially ease the stress related to the transition process.

“They can use the special relationships they have developed with their protégés as an opportunity to rebuild a stronger organizational culture and a renewed sense of commitment. When properly managed, change can also spark organizational regeneration, that is, build people who recognize that the rules of the game have changed, who see themselves as architects of change rather than victims, and who look for new ways in approaching their work.”<sup>78</sup>

In developing an innovative HR culture that provides for more honest and open communication for the CF, the acknowledged ability of the protégé to offer his or her participation in management of the transformation creates an all-around feeling of buy in. “Workers reported mentoring to be beneficial because they formed mutually enhancing relationships which positively influenced their self esteem, well being, and performance during drastic times of organizational change.”<sup>79</sup> In short, mentoring has proven to be an antidote to stress during corporate trauma.<sup>80</sup> The transition to the 21<sup>st</sup> century need not be so daunting for the CF.

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<sup>78</sup>Knackstedt, “Organizational Mentoring”..., 19.

<sup>79</sup>*Ibid*, 20.

A comprehensive and facilitated mentoring initiative will require considerable preplanning and forethought. The initiative must adequately address the needs of the protégé, the abilities and willingness of the mentor, and the degree to which the overall strategic goals of the organization will be realized.<sup>81</sup> In order to promote leadership development and facilitate effective succession planning, the initiative should be introduced in a prevailing culture conducive to HR transformation. There are various considerations inherent in the implementation planning for an effective mentoring initiative. “On the organizational level, the establishment of a mentoring program necessitates the coordination with other developmental initiatives, requires the involvement of decision makers, and may lead to a complicated and expensive administration.”<sup>82</sup> A prior assessment of the CF’s ability to sustain the characteristics of a successful mentoring process, therefore, would be an extremely worthwhile endeavour. Any sort of prudent needs analysis and feasibility study should include the following criteria/indicators:<sup>83</sup>

- the likely extent of voluntary participation;
- a sufficient pool of mentors at appropriate levels for the targeted protégé group; and
- the ability to integrate mentoring with the total development effort.

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<sup>80</sup>*Ibid*, 20.

<sup>81</sup>*Ibid*, 6.

<sup>82</sup>*Ibid*, 6.

<sup>83</sup>Murray, *Beyond the Myths and Magic of Mentoring...*, 107.

The degree to which the leadership officially endorses the initiative and subsequently communicates its promotion can also dramatically affect its chances for successful implementation.

The legacy of leadership in the CF already owes a great deal of its success to the practice of informal mentoring. Presently, the function of mentoring occurs on an ad-hoc basis throughout the CF. There are long-standing doctrinal publications that endorse the use of mentoring and fully acknowledge the responsibilities of their leaders in the development of service members. Some military formations go so far as to recognize the benefits of mentoring in the more unconventional applications. The 1<sup>st</sup> Canadian Brigade Group, in its Handbook of Military Knowledge (Hints on Traditions and Responsibilities) extols the wisdom and experience resident in the Company Sergeant Major. The handbook explains that “in view of this [considerable service and experience] the officer should not hesitate to ask his advice and should accept it in the spirit it is given. Although the new officer holds the Queen’s Commission, whereas the Warrant Officer does not, the latter has both the service and experience behind him.”<sup>84</sup> Other limited applications of the mentoring function to date have met with success within the CF. The Naval Reserve uses the practice of mentoring in preparing its aspiring Ship’s Commanding Officers to develop the command thought process and assist them in preparing for their Command Boards. The Air Force has also recently introduced a mentoring initiative for succession planning in its officer corps; however, the merits of

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<sup>84</sup>Department of National Defence, *1 Canadian Brigade Group – Handbook of Military Knowledge (Hints on Traditions and Responsibilities)* 5-2.

the initiative have yet to have reached their fullest potential.<sup>85</sup> It is clear that the notion of mentoring is not completely foreign to the CF. Some informal and sporadic forms of mentoring are being performed at various levels and through various functions in the current CF leadership practice.

In the assessment of the CF's current ability and commitment to sustain a much more robust, comprehensive and effective mentoring initiative, it must be reiterated that the underlying theme in Military HR Strategy 2020 is a stalwart pledge to long term commitment. The strategy document openly endorses that people are the heart of the organization and therefore the top priority. By making such a bold proclamation, the CF freely acknowledges that they must address essential long-term issues such as professional development and career paths, personnel tempo, family considerations, and ensuring a steady succession of trained personnel.<sup>86</sup> The transformation in leadership development is mandated to focus its attention on the needs of the service member. The guiding premise of any resultant mentoring initiative must, therefore, be focused on the needs of the protégé, while at the same time considering the abilities of the mentor and the overall goals of the organization.

By considering the service member as the epicenter around which the mentoring initiative should be structured, the assessment of protégé needs in an organizational context can reveal important indicators as to how to properly structure and facilitate the

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<sup>85</sup>LCol G. Potter, DND Chief of Air Staff PM&S, telephone conversation with Air Force Officer of Primary Interest for Mentoring, 15 April 2002.



initiative. By assessing the protégés' needs, a general plan can allow for a more knowledgeable determination of the types of mentoring behaviour, competencies and expertise required by the mentor. An informed assessment of protégé needs may also allow for a more productive and systemic approach in matching mentor and mentoring competencies to protégés. By making an initiative protégé driven, the mentor and protégé share in responsibility to the process while at the same time the overall HR needs and objectives of the organization are being addressed.<sup>87</sup>

The establishment of a facilitated CF mentoring initiative that espouses this protégé's perspective will also permit a value-based culture that can accommodate a shift from short-term task oriented training to a broader education and professional development based over a longer term.<sup>88</sup> "The Information Age will change the pace of the acquisition of knowledge and, more importantly the use of this knowledge – informed individuals must be able to criticize, provide educated opinions and act with independence to achieve mission success."<sup>89</sup> The very nature of the next generation of CF service members will clearly no longer respond to a culture of authority and discipline alone. "Motivation and long-term retention will increasingly be based more on organizational culture, fair treatment, and developmental opportunities other than salaries." The values that are passed on by the mentor and acquired by the protégé must foster an organizational culture that withstands the scrutiny of the entire CF, the

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<sup>86</sup>Department of National Defence, *Military HR Strategy 2020*..., i.

<sup>87</sup>Knackstedt, "Organizational Mentoring"..., 16.

<sup>88</sup>B.F. Skinner, *Beyond Freedom and Dignity* (New York: Alfred A. Knopf, Inc., 1971), 150.

<sup>89</sup>Okros, *Into the 21<sup>st</sup> Century: Strategic HR Issues* ..., 10.

Department of National Defence and all its stakeholders. In order to promote effective succession planning, a properly functioning mentoring initiative must address career satisfaction issues and ultimately improve command climates and culture through a more honest and immediate feedback process.<sup>90</sup>

The concept of organizational culture can be rather abstract and consequently can represent a significant challenge to transformation. “Culture can be analyzed as a phenomenon that surrounds us at all times, being constantly enacted and created by our interactions with each other.”<sup>91</sup> Ultimately culture in an organizational context, such as that of the CF, can be created, developed, manipulated, managed and changed. These dynamic and complex processes of culture creation and management are the essence of leadership. The leadership challenge for the current day CF is to step outside the culture that created the 1972 style professional leader and to start evolutionary change processes that are considerably more adaptive. “This ability to perceive the limitations of one’s own culture and to develop the culture adaptively is the essence and ultimate challenge of leadership.”<sup>92</sup>

If the CF concentrates their HR efforts on identifying and effectively to the needs of their service members, they are compelled to adopt a more flattened organizational hierarchy than that of the 1990s. By extension, if a more flattened organizational

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<sup>90</sup>*Ibid*, 10.

<sup>91</sup>Edgar H. Schein, *Organizational Culture and Leadership – Second Edition* (San Francisco: Jossey-Bass, 1992), 1.

<sup>92</sup>Edgar H. Schein, *Organizational Culture and Leadership...*, 2.

hierarchy is truly the intention of the CF leadership, then it must employ flexible and innovative thinking in its adaptation. The practice of mentoring lends itself uniquely to this cause, in that it provides a superb mechanism for the leadership to infuse and inculcate the issue of values as they foster the military ethos reflected in the profession of arms.<sup>93</sup> In a culture that recognizes that values are not taught, but acquired, the relaxed dynamic of mentoring provides a tailor made conduit in a more agile and open two-way channel of communication. “The future leaders will have functional expertise, core values, and high ethical standards and must operate as coaches, mentors or facilitators.”<sup>94</sup> The caution for the CF is in the means by which the leadership facilitates its mentoring initiative. Whereas the Military HR Strategy 2020 decrees that it is incumbent upon every CF leader to promote a healthy learning environment, the who, what, where and when of mentoring requires innovative thinking in its application.

A propensity to revert to time honoured concepts of leadership is understandable. To systemically endorse a mentor other than that of a service member’s immediate supervisor is clearly a departure from traditional “unity of command” precepts and requires the innovative and flexible spirit of the desired Military HR Strategy 2020 transformational culture. This is not to advocate that the CF adopt a laissez faire approach to mentoring; however, in the fulfillment of the organizational goals of leadership development and effective succession planning, a semi formal approach is recommended as the most suited. This type of initiative includes all the attributes of a

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<sup>93</sup>Peter S. Temes, *Teaching Leadership- Essays in Theory and Practice* (New York: Peter Lang Publishing Inc., 1996), 77.

formal initiative with the exception of matching mentors and protégés. In the semi-formal initiative, the organization provides education and training, and facilitates matching by providing opportunities for participants to meet and form their mentoring relationships. Formal matching or automatic matching of service member and supervisor does not occur in the semi formal approach. This would also allow for primacy of the protégés' needs yet retain sufficient supervision that the overall cultural goals of the organization could still be met.<sup>95</sup>

By analyzing the readiness of the CF to engage in a mentoring initiative, it is perceptible that the prevailing culture is very suitable to undergo such a long-term commitment. With the protégés' needs factoring prominently in this proposed transformational culture, the CF could foster its profession of arms through the innovation and flexibility of mentoring. In acknowledging that there are associated risks, the implementation of a semi formal initiative would serve as a significant step to mitigate some of the pitfalls experienced by the US military.

## **8. Addressing the Hurdles and Possible Pitfalls**

The inherent benefits of a facilitated mentoring initiative far outweigh the risks inherent, provided that the organization recognizes the constraints of the environment in which it operates and applies the overarching guidelines accordingly. The introduction of a mentoring initiative in an organization as large as the CF is, however, not entirely without risk. Although the CF, with its evolving culture of leadership development, is

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<sup>94</sup>Okros, *Into the 21<sup>st</sup> Century: Strategic HR Issues ...*, 9.

proving to be very suitable for the implementation of mentoring, some of its basic HR structural elements are worthy of examination and contemplation. An organization that “grows its own competence”<sup>96</sup> vice buying it from the economy, is in a position to require different types of mentoring throughout the tenure of any given service member. Clearly the mentoring requirements of a new recruit will change dramatically as he or she progresses through his or her career. Consequently, a potential hurdle for the CF will be in the HR leadership’s ability to appropriately assess the needs of the protégé and to subsequently manage the type and phase of mentoring provided.

In a rough order of magnitude, the phases of mentoring that match the needs of the protégé with the needs of the organization must take into consideration the all-encompassing concept of human resource development. Organizationally, mentoring could contribute to the HR areas of career entry and orientation, professional development, talent development for high potential service members, leadership development, and succession planning. By using mentoring as a tool for developing human resources over the span of a given service member’s career, the corresponding phases have the potential to range on a continuum from basic finding one’s identity within the CF to providing senior leadership mentoring. Renowned author Edgar H. Schein has written extensively on the challenges of matching individual and organizational needs and maintains that the best match is achieved when:

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<sup>95</sup>Knackstedt, “Organizational Mentoring”..., 22.

<sup>96</sup>Murray, *Beyond the Myths and Magic of Mentoring*..., 103.

- the “psychological contract” (that which defines what the employee will give in the way of effort and contribution in exchange for rewarding work, pay, benefits, job security and advancement) is perceived as being met;
- the “secrets” (what “really happens”/ the unwritten nuances) of the organization are being shared; and
- mid-career employees sense that employee and career self development is valued by the organization.

A dynamic mentoring initiative can form an extremely effective HR conduit to the achievement of these fundamental goals.<sup>97</sup>

The development of a dynamic mentoring initiative must not be done in isolation. To keep it insular from other HR and leadership initiatives is to grant it certain impotence. The context in which the CF operates, differentiates it in terms of constraints from similar sized organizations in the private sector. Along with the recruiting at base level practice already discussed, the CF is faced with reality that its service members rotate in and out of positions every two to three years. This presents certain logistical challenges to establishing a solid mentor/protégé relationship that normally matures by taking advantage of a face-to-face exchange medium. This frequent rotational posting process paired with the elevated operational tempo currently being experienced by the majority of the CF, adds increased pressure for the CF to identify more adaptive measures if its mentoring initiative is to yield its maximum potential. The relative success of these measures will be directly influenced by the degree to which the CF

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<sup>97</sup>Knackstedt, “Organizational Mentoring”..., 18.

leadership endorses the practice of mentoring and cognizantly allows its service members to engage in the practice during “company time”. Another consideration will be the ease with which the mentor/protégé can take advantage of communication technology in order to maintain a long distance mentoring relationship. With the heavy demands already placed on bandwidth availability for deployed units, the relative priority placed on the mentoring function via official communication devices will require a CF wide policy directive. Finally, the availability of unencumbered resources that may go towards the training and development in a mentoring initiative might be limited. Because the overall initiative goals may be achieved by refocusing and reprioritizing mostly internal resources, the relative short term costs of training and development must be compared to the long term gain represented by a greater personnel retention level, a sound succession planning mechanism and a rejuvenated leadership. In a strategic context, the dividends realized from a mentoring initiative must be measured over the long term.

Having addressed the potential fiscal, technological and geographical hurdles that might impact successful implementation of a mentoring initiative, it is heartily acknowledged that the biggest pitfall could come from a procedural misapplication. With all of its best intents, a mentoring initiative that is offered or perceived to be offered on an exclusive basis will create a dynamic known as “coat-tailing” and has the potential to be regarded more derisively than the complete absence of a mentoring initiative. The perceived fairness and equity with which any initiative is applied is the cornerstone to its success. In a semi formal initiative that permits and encourages the voluntary matching of protégé to mentor, the potential exists for people in senior positions to seek out people

most like themselves. This is a dynamic otherwise known as “cloning”. With the current demographic composition of the CF and, more significantly its senior leadership, this act has the potential to be disadvantageous to women and ethnic minorities who are less likely to seek out a mentor. Studies have also proven that individuals of lower socio-economic status origins tend to harbour less accepting attitudes towards authority and are therefore, less likely to seek out mentoring relationships with senior members than are those employees from a relatively higher socio-economic background.<sup>98</sup> The notion of coat-tailing represents a precarious balance between the selection of the natural leaders in a just succession planning procedure and a Medieval era ritual of Guild associations and Patrons.<sup>99</sup> For the CF to truly evolve with Canadian values and the resulting strategic environment, protégés must offer a valid feedback contribution to the senior leadership. Those protégés who “ride coat-tails” and are more prone to share similar old school views, may not be the most deserving of advancement and can cause the organization to stagnate if they ultimately make up the future senior leadership.

In a CF organizational culture that embraces equality, flexibility and innovative thinking must adopt a policy of inclusive mentoring practices. The focus of the initiative must be on the needs of the protégé as they align with the overall goals of the CF. The benefits that accrue to the mentor can be just as plentiful, yet may be more esoteric in their nature. Primarily, mentors feel an increased sense of competence and satisfaction in their contribution to the process. There is often an increase in confidence in their abilities

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<sup>98</sup>W. Whitely, T.W. Dougherty and G.F. Dreher, “Relationship of Career Mentoring and Socioeconomic Origin to Managers’ and Professionals’ Early Career Progress,” *Academy of Management Journal* 34, no. 2, (1991) 331.



and a discernable gain in respect amongst their peers and superiors. Most find the experience to be rewarding, creative and rejuvenating. “Mentoring enables the mentor to contribute to the next generation by passing on a legacy while learning valuable information and new technology from the protégé.”<sup>100</sup>

Although the current composition of the CF has a significant percentage of senior service members in the latter portions of their career, the voluntary nature of the semi formal initiative may also permit the protégé to look outside this more conventional for a mentor. To go beyond the more traditional way of thinking, the source of potential mentors may be expanded to include relatively senior members from other Military Occupations, senior Non Commissioned Officers for Junior Officers and, in some instances, peers with differing career progressions and perspectives. There may also be circumstances where a service member might opt to leave the CF at a relative midpoint in their career to pursue other interests. The matching of a well-suited CF Reservist mentor could offer the Regular Force protégé a unique perspective on his or her impending transition.

Thinking even further beyond the conventional, an initiative to engage retirees into the mentoring process might grant access to a substantial untapped resource. Because of the relatively early compulsory retirement age imposed in the CF, the prospects of retirement and impending disassociation with the military often causes

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<sup>99</sup>Bill Wild, *Understanding Mentoring* ..., 18.

<sup>100</sup>Knackstedt, “Organizational Mentoring” ..., 5.

significant trepidation for its aging members. By affording retiring members the opportunity to continue contributing to their legacy through mentoring, the CF can broaden the make up of its mentoring pool while at the same time grant an ongoing association to those who wish to contribute. This could be very advantageous to retirees as it would allow them to transition to their “new life” with dignity, pride and the acknowledgment that they have not been forgotten. This type of initiative could be conducted purely on a voluntary basis or through a more structured mechanism such as tax incentives or nominal retainer fees. This approach is similar to that currently used to engage honorary Colonels and Captains (Navy), however, the retired mentor would not necessarily have to retain a uniform nor be expected to have attained as high an influence in the civilian domain.

If the protégé, mentor and organization are all to benefit, the culture within the organization must uphold the basic tenet of complete fidelity. The leadership development that evolves as a result of mentoring must accept that not all of its leaders will necessarily progress to the highest rank levels. Mentoring is primarily concerned with developing the protégé to the best of his or her potential in the fulfillment of an organizational goal, yet the contribution to the CF and the citizens of Canada must be observed as the benchmark by which each service member and or leader measures their success.

The current CF Performance Appraisal System (CFPAS) has a Reviewing Officer that also addresses a number of factors concerning a service member’s potential. The

successful integration of organizational goals through mentoring would require that the CFPAS recognize this undertaking. Early in the CFPAS process, a protégé and his or her supervisor could outline the prospective goals for the ensuing assessment period and how they intended for the mentoring process to facilitate those goals. At the Performance Development Report interview, service members could openly discuss their goals and how they hoped to attain them based on the product of their mentoring discussions, amongst other dynamics. The aspects directly associated with the protégé could be leadership development, career development, professional development, and personal development as mentoring has shown to serve these specific HR purposes.

The career management system should also be conversant with the protégés' forthright aspirations and their associated mentoring arrangements. By having more clarity on career progression issues through mentoring, the protégé can take on a more interactive role in his or her career management. More choice in subsequent postings and career paths should, therefore, be given to the individual service member in order to respect the individualized consideration stemming from the protégé's needs. Where the operational dictates of the CF will permit, the focus for career management and succession planning must take on a personnel development bias while at the same time responding to service requirements. Through the process of mentoring, the protégé will be better able comprehend his or her potential within the organization and how they may best serve to reach that potential. Notwithstanding the fact that senior leadership will identify some that should be mentored with a view to eventually taking over the senior

most positions, the mentoring application will be inclusive and accommodate all of those who wish to participate.

A system that facilitates the protégé and mentor match up based on needs and goals as opposed to the chain of command exigencies must have the process owner fully conversant with the prevailing CF organizational strategy. In order to oversee a process that may include retirees, Reservists and out of occupation candidates (including civilian professionals in some cases) as potential mentors, the guidance of a protégé's military occupational code (MOC) leaders will be required to provide the necessary long-term appreciation. Conceivably, the management of the facilitated mentoring initiative could be further subdivided into regional applications if the numbers warranted, much in the same way that coastal and regional MOC advisors exist today. As always, the primacy of operations will be upheld, yet the pitfall of having the mentoring process owner outside the realm of strategic awareness would be averted.

## **9. Recognizing and Celebrating the Ancillary Benefits**

By firmly ensconcing the practice of mentoring, the CF may easily reap the benefit of other unforeseen efficiencies in a variety of spin-off applications. A case in point for a very practical application where mentoring could easily span and augment all environments is the manner with which we could study and teach defence ethics. With the aim of ensuring that members of the CF and employees of DND perform their duties to the highest ethical standards, a Defence Ethics Program was initiated in 1997 under the authority of the CF Chief of Review Services. The program is a value-based, normative

and top-down program that publicly declares what ethical values the organization and its members will stand by to satisfy their defence obligations to Canada. Its detailed training plan explains how a two-tier approach is recommended for the implementation of Defence Ethics training. One level addresses the general requirements of Defence Ethics while the other level responds more specifically to address different defence organizational cultures. Although the responsibility for training rests with the Environmental Chiefs of Staff and Group Principals, the program recognizes that there is a multiplicity of methods to fulfill the training requirement. Through the trust and intimacy developed in a mature mentoring relationship, the full intent and spirit of the Ethics Program training requirements could be easily achieved in order to augment the other more conventional means of training. Ethics training is a highly personalized subject that mentoring could facilitate given its overall nurture in the consideration for attainment of CF organizational goals. The passing on of our values, ethics and beliefs is not a foreign concept to the current day CF leadership, yet the prospects of a facilitated mentoring initiative offers such potential for an effective conduit to be *the tie that binds*.

The new organizational culture that will nurture and foster the profession of arms in Canada will require its members to possess a specialized body of knowledge and skills, with the ability to demonstrate their expertise competently and objectively. Service members will be required to share a series of core values and beliefs found in the military ethos that guides them in the performance of their duty and allows a special relationship of trust to be maintained with Canadian society.<sup>101</sup> The leadership challenge associated

with sustaining the profession is not without formidable challenge and the need for innovative and effective self-regulation. In developing its future leaders, it is not enough to merely set and maintain the necessary standards. The ongoing nurture of the development will require an array of systemically endorsed media through which this vital message will pass. In comprehending that professional development is integral to a healthy profession of arms, the CF must recognize that progress in this regard may well be a gradual and cumulative process. This process allows service members to acquire the necessary professional qualifications, identity and understanding over time.<sup>102</sup> As professional development is integral to a healthy profession of arms, the practice of mentoring can be seen as integral to healthy professional development. Mentoring addresses the unique needs of each individual, puts them into organizational context and thereby gives meaning to the new HR motto of: *Look after our people, invest in them and give them confidence in the future*<sup>103</sup>

## 10. Conclusion

By Canada recognizing its involvement in a rapidly changing world, it became the responsibility of the leadership of the country to clarify its key objectives in pursuit of its Foreign Policy. After a 1995 review, DFAIT promulgated a foreign policy that reflected the values and cultural beliefs of the Canadian public. It was a policy that embraced a stable global framework and the protection of Canadian security. It was a policy that had

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<sup>101</sup>Department of National Defence, A-PA-005-000 AP-001 *Duty With Honour – The Profession of Arms in Canada* (Ottawa:DND Canada, 2003), 10.

<sup>102</sup>Department of National Defence, A-PA-005-000 AP-001 *Duty With Honour...*, 56/57.

the CF figure prominently in its projection. The CF responded by considering the needs and expectations of major stakeholders, assessing the institution's strengths and weaknesses, and by analyzing the emerging defence issues. By establishing a solid and forward-looking Defence HR Strategy, the CF was able to dedicate its human resources in a fashion that would best respond to the new challenges. The revised HR policies held as their basic tenet that the CF would concentrate on looking after their people by making one's service to country the career of choice. The corresponding HR practices had to be innovative and flexible and lead to a revitalized profession of arms.

With the current CF facing a socio-demographic reality that has an extraordinary percentage about to retire, the call for leadership development and succession planning has never been so immediate and pressing. The HR environment is in dire need of a mechanism through which it can more effectively convey its skills, beliefs and values. The opportunity for an innovative mentoring initiative proves to be cost efficient and effective, yet the leadership environment over the past few decades made for a more authoritative milieu that only considered mentoring in very limited applications.

By considering the common mentoring concepts and best practices of the public sector and more specifically other military applications, it is evident that the CF has a great deal to gain with minimal inherent risk. If implemented correctly, the generic benefits that would accrue to the CF would be shared amongst the protégé, the mentor and the CF at large. By formulating a initiative that places the protégés' needs at the

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<sup>103</sup>Department of National Defence, *Military HR Strategy 2020...*, 1.

forefront while keeping the mission and service requirements in mind, the CF could assist the protégé and mentor to come together and take greater advantage of modern practices that are conducive to a meaningful relationship.

The CF does have its own peculiarities with respect to its terms of service, career management and performance appraisal, yet the implementation of a facilitated mentoring initiative promises to enhance these functions and most importantly support the overall goals of the CF. By providing a conduit through which the passing of skills, knowledge, values and ethos could be readily achieved, the function of succession planning is given a revitalized focus and distinct advantage. The challenge of leadership development is also served extremely well through the practice of mentoring by creating a culture in which there is a free and open exchange of ideas and honesty. By making mentoring available to all who seek it, the CF can pass on its cultural beliefs and attitudes more effectively while at the same time understand the new generation of protégés so as to update the culture. The cyclical nature of this process revolves on the ethos of the profession of arms.

The timeliness for mentoring in the CF is most appropriate, given the strategic HR goals outlined in the Military HR Strategy 2020 policy documents. With a properly facilitated initiative, the CF also stands to gain an effective means by which to augment the Defence Ethics Program. Also recognizing the increased demands placed on its service members, the CF has devised an Ethics Program that calls on its leaders to convey the example and teachings of proper ethical behaviour through open and frank teaching



sessions. In an environment that embraces mentoring, ethics training could be given a personalized dynamic not otherwise attainable.

The trust and intimacy experienced in an effective mentoring environment allow for opportunities otherwise unavailable to organizations such as the CF. Effective mentoring is a simple, effective, efficient and complementary solution to the HR issues facing the CF leadership. If the CF hope to successfully address the extraordinary socio-demographic challenges over the next 20 years and beyond, they must deeply ensconce the practice of mentoring to ensure effective succession planning and sound leadership development. Clearly, mentoring is an integral measure in the transformational leadership development of the CF.

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