

Program Start-up Toolkit for Mentors

CPA Martin Mentorship Program for Indigenous High School Students

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MANAGING YOUR PROGRAM

This toolkit provides mentorship team leads with key guidance, tools and templates to help you manage your program.

There are three critical stages in the program year:

- **Planning**
- **Student/mentor activities**
- **Program monitoring and evaluation**

You will learn the key steps in each stage and find tools to help you. As well, you will understand the program data needed by CPA Canada and the process to provide it.

PROGRAM OVERVIEW – ROLES AND RESPONSIBILITIES MATRIX

This chart provides an overview of key program activities and responsibilities.

PLANNING & STUDENT/MENTOR ACTIVITIES

Activity/ Responsibility*	Mentorship Team	School Team	Student	Parent/ guardian
Communicate participation to school staff		Responsible		
Chair school setup meeting		Responsible		
Recruit students		Responsible		
Recruit mentors/ provide orientation	Responsible			
Chair parent/school team meeting		Responsible		Participate
Chair program planning meeting	Responsible	Participate		
Oversee police checks	Participate	Responsible		
Document/follow school protocols	Participate	Responsible	Participate	
Obtain permissions from parents/ guardians		Responsible		Participate
Provide student list to CPA Canada on request		Responsible		
Chair kickoff meeting	Responsible	Participate	Participate	Participate

MONITORING, WRAP-UP AND EVALUATION

Activity/ Responsibility*	Mentorship Team	School Team	Student	Parent/ guardian
Calendar/ reminders to students and staff	Participate	Responsible		
Monitoring	Responsible	Participate		
Chair wrap-up meeting	Responsible	Participate		
Evaluation	Responsible	Participate	Participate	
Reporting to CPA Canada	Responsible	Participate		
Provide list of graduating students to CPA Canada on request		Responsible		

** Those designated as responsible can and should delegate tasks as appropriate.*

PLANNING

In this section, you will find information on key planning aspects: recruitment and orientation of mentors and the planning meeting.

MENTOR RECRUITMENT

Mentors are the heart of the program. It's important to recruit mentors who have the discretionary time, interest and capacity to participate in the program at a high level through the entire school year.

Who is responsible – Mentor team lead.

When – Ideally potential mentors should be identified by the close of the prior school year or over the summer break. If this is not possible, it should be done as soon as possible in the current school year.

What is involved – Mentors should be identified by their employer based on their record of performance, personal attributes and interest in the program.

The mentorship team lead is responsible for ensuring all mentors sign the Mentorship Agreement, which outlines mentor qualities and accountabilities.

MENTOR AGREEMENT FORM

The following agreement is required to be signed by all mentors participating in the program.

Mentor Agreement Form

As a volunteer mentor in the CPA Martin Mentorship Program for Indigenous High School Students, I agree to

- Attend an orientation session;
- Notify the school if I am unable to keep the scheduled mentoring session;
- Keep discussions with the student confidential, unless the student's safety or well-being is at risk;
- Contact the school coordinator when I need assistance or I am having difficulty with the mentoring relationship;
- Notify the school coordinator of any changes in my employment, address and telephone number;
- Notify the school coordinator of any significant change in the student;
- Ensure that the parents of your mentor are notified if a student is attending a meeting off of school property;
- Submit the contact sheets as requested;
- Participate in the program evaluation;
- Reflect the highest professional and personal standards of behaviour, as reflected in my firm's guidelines and those set out by the school board of the student(s) I mentor.

Signature

Date

CRIMINAL RECORDS CHECK

It is the responsibility of the school to ensure all mentors have the required checks in accordance with school and school board policy.

The school team can provide the following information to assist mentors in complying with the requirement for a police check:

- Type of police check required (i.e. volunteer police check, vulnerable persons screening)
- Where to get your police check
- How to arrange a police check
- Cost (if applicable)

MENTOR ORIENTATION SESSION

When all mentors in the program work for the same firm/employer, it's natural that those on the mentorship team will get together to discuss the program as a group before the planning meeting takes place with the school team.

However, in cases where mentors are employed by different organizations, it's best practice to formally organize a mentor orientation session or conference call prior to the planning meeting.

Who is responsible - The mentorship team lead organizes and runs the meeting.

When - The meeting should be held before planning meeting with the school team.

What's covered - This meeting is an opportunity for the mentorship team to review the program objectives, best practices and mentor "dos and don'ts."

MENTOR ORIENTATION SESSION: AGENDA

This template can be used to prepare an agenda for your mentor Orientation meeting.

Date:

Time:

Attending:

Location:

Call-in information:

1. Welcome and introductions
2. Background and goals
3. Mentoring do's and don'ts/mentor relationships and roles
4. Potential activities
5. Q&A
6. Next steps and closing remarks

MENTOR ORIENTATION SESSION: ACTION SUMMARY

This template can be used to prepare an action summary for your mentor Orientation meeting.

Follow up & Next Steps	Action item	Responsible	Due Date
Welcome and introductions			
Background and goals			
Mentoring do's and don'ts/Mentor relationships and roles			
Potential Activities			
Q&A			
Next Steps			

PLANNING MEETING

A timely planning meeting between the mentor team and school leads is an essential first step in a successful program year. The objectives of the planning meeting are to:

- **set program goals and schedule for the year**
- **identify recruitment needs for new mentors and students**
- **discuss relevant program protocols and plans to be communicated to the mentor team**
- **Identify an activity for the kick off session**
- **Identify other potential program activities**

Who is responsible - the mentor team lead organizes the planning meeting, including preparing and distributing the agenda, and taking and distributing meeting notes.

When - Ideally, the planning meeting should be held at the close of the prior school year or over the summer break. If that is not possible, it should be held as soon as possible in the current school year. Delay in scheduling the planning meeting will impact the effectiveness of the program as all student activities follow the planning session.

Who attends - at a minimum, the mentor team lead and the school lead attend. In collaboration with the school team lead, consider inviting other key members of the team (e.g. school indigenous support personnel, mentor team member with program organization or management responsibilities)

PLANNING MEETING AGENDA AND PLANNING MEETING ACTION SUMMARY

These two templates can help you plan, conduct and report on an efficient planning meeting covering all key areas and identify follow up actions.

The *Planning Meeting Action Summary* also includes links to the following resources that will further assist teams to plan their program year:

- **Activities section of this website, which provides an extensive list of activities with related guidance and is an invaluable tool in identifying possible session content for your program. It may be useful to have access to this link during the meeting.**
- **Orientation - this section provides agendas, sample speaking notes and other guidance for the program orientation session. This toolkit should be used as a minimum in the first year of a program. In subsequent years, some of all of the toolkit may be used at the kick off meeting depending on the number of new students and mentors.**
- **Program Policy and Protocols Checklist - this checklist is reviewed during the meeting to assist the school to identify and communicate to the mentor team lead all relevant protocols and requirements for mentor interactions with students.**

PLANNING MEETING AGENDA

This template can help you prepare your planning meeting agenda.

Date:

Time:

Attending:

Location:

Call-in information:

1. Welcome and introductions (if there are new members)
2. Review of key achievements and biggest challenges (include prior year's performance scorecard)
3. Main program goals for the coming year
4. New resources required
5. Confirm new and returning students
6. Confirm new and returning mentors
7. Confirm new and returning school team members
8. Kickoff session
 - a. Date
 - b. Agenda
 - c. Coordination of invitations for students and parents (See Orientation section)
 - d. Responsibilities (See Orientation section)
9. Potential activities and tentative dates for review at kickoff session (refer to activities list from the Program Handbook)
10. Confirm program policies/protocols (See checklist)
11. Status of mentor police checks (See checklist)

PLANNING MEETING ACTION SUMMARY

This template can help you summarize the action items, responsibilities and timelines coming out of your planning meeting.

	Available tools	Responsible	Due Date
Review of key achievements and biggest challenges	Performance scorecard		
Main program goals for the coming year	Performance scorecard		
New resources required			
Confirm returning and new students			
Confirm returning and new mentors			
Confirm returning and new school team members			
Draft program of activities and tentative dates for review at orientation	Resource Centre - Activities		
Agree on kickoff date, session agenda, invitees and responsibilities	Mentor Orientation Session		
Coordinate student and parent invitations to kickoff session	Planning Meeting		
Potential activities and tentative dates for review at kickoff session			
Confirm program policies/protocols	Program policy/protocol checklist		
New required police checks			

KICKOFF MEETING

The kickoff meeting provides the opportunity for everyone involved – students, parents/guardians, the mentorship team and school team – to get to know each other and learn more about the program.

You can use the meeting to help those attending develop a common set of expectations about what's ahead and the role each person plays in setting up students and mentors for success.

Who is responsible – The mentorship team lead is responsible for organizing and running the meeting.

There also needs to be strong, visible participation from the school champion, who can act as a liaison between, parents/guardians and students and the mentorship team.

The school champion will often open the meeting, welcome everyone, make introductions and say a few words about the program before turning the agenda over to the mentorship team lead.

When – The kickoff meeting should be held early in the new school year.

What's covered – This is an opportunity to review program goals and benefits, roles, the proposed activities calendar and protocols and to reinforce key success factors like attendance.

Recognize that students may be shy, nervous and challenging to engage early in the program. It's a good idea to consider questions to ask of parents/guardians or other ways to break the ice and create dialogue (e.g.: ask every parent/guardian to share what they would like to see as a key outcome from the program).

In addition to covering the program basics, having an opportunity to chat over light refreshments before or after the meeting can help create a relaxed atmosphere.

KICKOFF MEETING: AGENDA

This template can be used to prepare an agenda for your kickoff meeting.

Date:

Time:

Attending:

Location:

1. Welcome and introductions of teams (by school champion/principal)
2. Self-introductions by parents and students [invite thoughts on what they want to gain]
3. Program overview [or update if existing program] and benefits
4. Review activity calendar
5. Reinforce program policies/protocols
6. Next steps
7. Q&A

KICKOFF MEETING: ACTION SUMMARY

This template can help meeting participants summarize the action items, responsibilities and timelines coming out of the kickoff meeting.

	Action Item	Responsible	Due Date
Welcome and introductions			
Self-introductions by parents/guardians and students; desired program outcomes.			
Program overview			
Review activity calendar			
Reinforce policies and protocols			
Next Steps			
Q&A			

STUDENT/ MENTOR ACTIVITIES

Student/mentor activities are the core of the program. The mentor team lead and the school lead, as well as all students and mentors, attend each activity. Other school team members may also attend.

The timing, nature and content of individual activities are decided on an individual school basis, taking into account the circumstances and needs of each team. See [Activities](#) for complete guidance on holding activities as well as suggested activities for your team.

Who is responsible – the mentor team, together with the school, is responsible for choosing, planning and conducting activities. Best practice strongly encourages involving the students in choosing activities

When – Activities should be scheduled throughout the school year, respecting school timetables for examinations and key activities. Best practice strongly advises choosing and scheduling all activities at the beginning of the school year to make sure all mentors and students can attend.

ACTIVITIES STARTER KIT

To start you off, here are seven recommended activities to consider when creating your activities plan with students in your program.

1. Launch event

Meet the students and introduce them to the world of the mentorship program. Download a list of [activities](#) from the resource centre to help with introductory games and set the agenda for the year ahead.

2. Financial Literacy in the classroom

Book a CPA Canada [Financial Literacy Workshop](#). A Financial Literacy volunteer will deliver one of CPA Canada's grades 10/11 events.

3. Scholarship application workshop for students in Grade 12

Help students learn about university, college, apprenticeship options and scholarship opportunities. (Download the [Quick Guide to Postsecondary Scholarships and Bursaries in Canada](#)).

4. Office/workplace visit

Develop student understanding of your workplace and profession by discussing workplace rules, policies and procedures, work ethic issues, organizational culture, unwritten rules and social aspects.

5. Resume workshop

Teach students how to prepare a professional resume that reflects their skills, knowledge and education that are relevant to the job they are seeking.

6. Indigenous resources in our community

Teach students about the various resources available in your community. (Download the [Friendship Centre brochures](#) for centres near you. Additional materials: [Career Journeys](#); an interactive activity to do with your students.)

7. End of year event

Provide feedback and review accomplishments. Plan a pizza party, escape room, etc.

PROGRAM ACTIVITIES PLAN

This template can help you summarize your planned activities for the year. It assumes six activities over the school year; adapt to your program.

Best practice is to make sure you put the entire year's plan in place, complete with dates and responsibilities, at the beginning of the school year.

Activity	Date	Activity lead	Location	Transportation
Orientation				
Activity				
Activity				
Activity				
Activity				
Wrap-up				

STUDENT INITIAL SURVEY

Use this survey to learn about the students in your program.

This survey will help us learn about you and the other students who are participating in the CPA Martin Mentorship Program. It is important for us to learn as much as we can about what you get out of your participation and how we can improve the program to make it even better. It is important that you answer each question as honestly as you can. Remember that there are no right or wrong answers.

Your Name: _____

Date: _____

School: _____

Please CHECK ONLY ONE BOX per item.

How many adults in your life (parents/guardians, teachers, elders, relatives, friends, etc.) do the following things for you?	None	One	2-3	4-5	6 or more
a. Offer help with schoolwork.					
b. Praise you, when you do something good.					
c. Pay attention to what is going on in your life.					
d. Offer advice about personal problems, such as a problem with a friend.					

How often are the following true for you?	Never	Sometimes	Often	Very Often
a. I pay attention in class.				
b. I often come to class unprepared.				
c. I do not try very hard in school.				
d. I work very hard on my schoolwork.				

How important is each of the following to you?	Not At All	Somewhat Important	Important	Very Important
a. Accepting responsibility for my actions when I make a mistake.				
b. Doing my best even when I have to do a task that I do not like.				
c. Helping to make the world a better place in which to live.				
d. Giving time or money to make life better for people.				

To what extent do you agree with the following statements?	Not At All	Sometimes	Often	Very Often
a. I am able to make decisions easily.				
b. I am looking forward to the years ahead.				
c. If I put my mind to it, I can learn almost anything.				
d. I set goals for myself.				
e. I am doing the best I can in school.				
f. I plan to attend university or college.				
g. I have considered Accounting as a career.				

THANK YOU VERY MUCH FOR COMPLETING THIS SURVEY.

Please return to [NAME].

GETTING TO KNOW THE STUDENT

The following questions can be used to break the ice with students during one-on-one discussion.

1. What do you like most about school?
2. What do you like least about school?
3. What class is most challenging for you?
4. What is your favourite class?
5. What school subjects do you do well in?
6. What do you need extra help with in school?
7. If you could change anything about yourself, what would it be?
8. When you do not do as well in school as you can, it is usually because...
9. When you have leisure time, what do you like to do?
10. What career are you most interested in?
11. Do you take outside classes of any kind?
12. Do you have any pets?
13. What is your favourite: — Food — Place — Sport — Indoor activity

PROGRAM MONITORING

Program monitoring is both formal and informal and contributes to the success of the program by enabling teams to deal with any challenges on a timely basis, as well as improve the program for the benefit of all students, schools and mentors.

ONGOING MONITORING

Most program monitoring occurs around and during the scheduled activities. During these activities, mentor and school leads assess factors like mentor and student attendance, engagement and satisfaction, deal with logistical or other challenges and implement any necessary program changes.

Many teams find it helpful to schedule a formal mid-year “check in” meeting between the mentor team lead and the school lead outside of regular activities to discuss progress against expectations, either by phone or in person.

Finally, CPA Canada schedules regular mentor lead conference calls to discuss program updates, and distribute information teams may find relevant or useful.

PROGRAM WRAP-UP AND REPORTING

In addition to the informal monitoring which takes place during the program year, a scheduled program wrap-up allows teams to reflect on the successes and challenges of the program year and provide a sound basis for future years. It also provides required reporting to CPA Canada for your program.

Who is responsible – the mentor team lead organizes the wrap up meeting, including preparing the agenda and taking and distributing notes.

When – the wrap-up meeting should be held in late spring and not later than the end of the school year. Many teams find it useful to hold this meeting before the last activity of the program year as items may be identified for student feedback.

Who attends – as a minimum, the mentor team lead and the school lead attend. Other key members of the team (e.g. school indigenous support personnel, mentor team member with program organization or management responsibilities) may also be invited.

Wrap-up meeting agenda – the Program Wrap-up Meeting: Agenda and Program Wrap-up Meeting: Activity Summary documents are key resources to help you conduct an efficient meeting covering all key areas and identify follow up actions.

Program reporting – the Program Wrap-up Agenda and Activity Summary includes a link to [Program Scorecard](#). During the planning meeting, the mentor team lead and the school lead discuss and agree on the content of the scorecard. The scorecard is required to be completed and submitted to CPA Canada by the mentor team lead not later than June 30 following the end of the program year.

CPA Canada data requirements and collection process – To help us monitor the program, anticipate challenges, share best practices, prepare certificates for graduating students and report to the Martin Family Initiative, CPA Canada gathers and maintains up to date information on:

- **Mentor team members**
- **School Team members**
- **Students (as permitted by the school or board)**
- **Activities**

Who is Responsible:

CPA Canada will collect:

- **Mentor team information from the mentor team leads**
- **School team information from the school team lead**
- **Student information from the school team lead**

PROGRAM WRAP-UP MEETING: AGENDA

The mentorship team lead may use this template to develop an agenda for your program's wrap-up meeting.

Date:

Time:

Attending:

Location:

Call-in information:

1. Welcome
2. Roundtable discussion of key achievements and biggest challenges
3. Rate the program ([Scorecard](#))
4. New resources required
5. Confirm new and returning students
6. Confirm new and returning mentors
7. Confirm new and returning school team members
8. Planning Session for next year
 - a. Date
 - b. Agenda items
 - c. Responsibilities

PROGRAM WRAP-UP MEETING: ACTIVITY SUMMARY

Use this template to develop an agenda for your wrap-up meeting and summarize activities.

	Available tools	Responsible	Date
Review of key achievements / biggest challenges			
Rate the program	Program scorecard		
Identify any new resource needs			
Confirm returning and new students			
Confirm returning and new mentors			
Confirm returning and new school team members			
Planning session for next year (date, agenda items, responsibilities)			