



Final Report

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Acknowledgements

We gratefully acknowledge the willingness of the following program managers to share with us their program approaches, successes, materials and suggestions during our research for the ACT-BC project.

We especially appreciate the assistance of:

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- Kim Rickard, Mentors Online, Australia
- Deborah Kirby, Telus New Ventures, British Columbia
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Executive Summary

Introduction & Overview

The overall growth of the British Columbia technology sector and its contribution to the provincial economy has been well-documented by the BC Technology Industries Association and Leading Edge BC. However, the technology sector in regional BC is not growing as quickly as it is in the Greater Vancouver and Victoria areas.

The PIC Report (Promoting Innovation & Commercialization in Rural British Columbia, 2003) identified eight strategic recommendations to address obstacles inhibiting this growth.

To ensure that the current needs of regional technology companies were clearly understood, in addition to reviewing the information contained in the PIC Report, regional high technology studies conducted after the publication of the PIC Report were reviewed and stakeholders and representatives from First Nations organizations and other relevant agencies, such as Community Futures, were interviewed.

This review confirmed the need to address mentoring, access to financing and networking.

The ACT-BC Project (Assisting the Commercialization of Technology in Rural British Columbia) was developed to address three of the key obstacles – access to experienced mentors, access to financing, and the development of networks.

The strategies developed in the ACT-BC project were based on:

- Input from industry and provincial and regional stakeholders
- Information from successful programs operating in other jurisdictions
- Best practices identified during research

Two programs were developed and offered as pilot projects.

1. **MentorLinx**

- a mentoring program that links regional technology Chief Executive Officers (CEOs) with experienced mentors, and provides educational materials to assist these CEOs to determine their:
 - stage of business development
 - growth intentions for their business
 - next steps to attract investment

2. **IdeaLinx**

- a networking program that brings together industry, post-secondary researchers and relevant government representatives for the purpose of increasing connections and promoting collaboration

The pilot phase for each of these programs took place during the fall of 2005 and resulted in positive feedback from participants about the assistance they received.

The programs are now ready for wider implementation.

Summary of Recommendations

1. Proceed to full implementation of both MentorLinx and IdeaLinx in all regions.
2. Increase regional innovation council staff time available for MentorLinx to:
 - a. Recruit mentees and orient them to the program
 - b. Recruit mentors and provide information on best practices for mentoring
 - c. Monitor the matches
3. Increase regional innovation council staff time available for IdeaLinx to:
 - a. Recruit participants
 - b. Organize regular events
 - c. Follow up and monitor resulting collaboration
4. Investigate the need to establish an Aboriginal MentorLinx/IdeaLinx Coordinator position to assist eligible aboriginal technology entrepreneurs.
5. Provide assistance to regional technology companies in identifying and applying for appropriate funding programs.
6. Offer information sessions on funding programs for companies, such as those offered in some regions for Scientific Research & Experimental Development (SR &ED) tax credits, but including other programs as well.
7. Publish and distribute the MentorLinx materials on access to financing for general use with appropriate companies and by other agencies, such as Community Futures.
8. Monitor and report on progress made by companies participating in MentorLinx and IdeaLinx.

Regional technology companies that participated in the ACT-BC project were positive about the benefits obtained from their experience as participants in this pilot project.

It is important to build on the work begun in the pilot project and extend the benefits to all eligible companies in regional technology sectors.

Research – Regional, National and International

Mentoring

Through internet research and stakeholder referrals, a wide variety of business mentoring programs currently operating successfully were identified. In order to identify those most relevant to this project, programs that targeted technology company CEOs in rural areas were selected. Other criteria included:

- Had been in successful operation for several years
- Had developed legal documents, forms, etc.
- Used volunteer mentors
- Used a distance mentoring model

Sixteen programs warranted a closer look.

Of these, the following nine programs contained interesting elements but did not meet our criteria as closely as the programs selected for in-depth review.

- AceTech
- Biomedical Commercialization Canada Inc.
- BC Human Resources Management Association's Professional Mentoring Program
- CONNECT Denmark
- Export E-Mentoring Pilot
- Inno-centre Alberta
- Mentoring for Growth
- SCORE (Service Corps of Retired Executives)
- Women's Enterprise Society of BC Peer Mentoring Groups

Seven programs underwent a more detailed review, including interviews with the program managers where possible:

- Business in the Community – New Zealand
- Business Mentoring Northwest – Northern Ontario
- Entrepreneurs' Forum - Maritimes
- Mentors Online - Australia
- Rocket Academy - Vancouver
- Telus NewVentures BC – British Columbia
- Association of Professional Engineers, Geologists and Geophysicists of Alberta Mentoring Program - Alberta

From this research, **MentorLinx** was developed as a cross-regional distance mentoring program for rural technology CEOs.

Access to Financing

Although companies had identified lack of access to financing as an obstacle to their growth, further review revealed that, in many cases, the companies did not understand investors' needs and had not taken the necessary steps to make the company attractive to investors.

Many CEOs were not able to clearly describe the current development stage of their business. They were unaware of the impact that their business intentions (with regard to growth and control) had on their attractiveness to investors. They had usually not taken part in workshops or seminars that explained the process of attracting investment. These were critical gaps that needed to be addressed.

In addition, companies were generally unaware of other forms of financial assistance, e.g. funding programs that might be available to them.

As a result, the following four documents were prepared to address these areas:

- a listing of funding programs available to technology companies
- a workbook, *Getting Ready for Investors*
- a summary of the Steps to Growth Capital information contained on the www.strategis.gc.ca website
- a listing of financing courses, educational materials and advisory contacts

These materials have been provided to the regional innovation councils for use in the MentorLinx program and are also suitable for wider distribution to other types of companies as needed.

Industry/Academia/Government Networks

A wide variety of networking programs in various jurisdictions were reviewed. Fourteen were selected for a closer look and grouped into five categories:

1. Networking through organizations located at or stemming from academic institutions:
 - a. London Technology Network, UK
 - b. University Industry Liaison offices, BC
2. Networking through community development agencies
 - a. Know-How Wales
 - b. Innovation Resource Centre, Prince George, BC
3. Networking through national Science and Technology Centres and Services
 - a. Centres of Excellence, Canada
 - b. Mathematics of Information Technology and Complex Systems (MITACS), Canada
 - c. National Research Council Industrial Assistance Research Program, Canada
 - d. Anvar, France
4. Multi-country networks
 - a. Faraday Partnerships, UK
 - b. Smith Institute for Industrial Mathematics and System Engineering, UK
 - c. EUREKA, Europe
5. General networking through peer mentoring groups
 - a. AceTech, Canada
 - b. CONNECT Denmark
 - c. Women's Enterprise Society Peer Mentoring Groups, BC

In general, networking programs relied on face-to-face contact and were event-based.

As a result, IdeaLinx was developed as an event-based model that was piloted in three regional locations:

- Prince George
- Kamloops
- Castlegar

MentorLinx and IdeaLinx

MentorLinx

The key characteristics of the program are that it:

- is targeted to rural technology company CEOs who are at or near revenue stage
- uses volunteer mentors from other regions
- is conducted by telephone or email
- is for an initial period of three months
- begins with a three-way introductory call between program administrator, mentee and mentor to review key points
- continues with one or two, half to one-hour calls per month between mentee and mentor
- requires the mentee to initiate the ongoing calls at a mutually convenient time
- encourages the matches to use a perpetual agenda to guide their discussions
- asks the mentee to develop and focus on a goal for the sessions that is specific, measurable, attainable, and realistic with a time frame (SMART)

A total of eighteen mentors were recruited – eight from the Lower Mainland, six from Vancouver Island, two from the Central Interior, and one from the East Kootenay.

A total of eight mentees participated in the pilot – two from Prince George, one from the Okanagan, one from the East Kootenay, one from Vancouver Island, and three from the West Kootenay.

Each mentee was matched with one mentor.

The mentors not currently in matches are available for future matches.

Feedback from the matches was positive with constructive suggestions for improving the program as it is implemented across the regions.

Access to Financing

Feedback from the regional councils on the four documents prepared was very positive, with many of them seeing a much wider use for them than just within the MentorLinx program.

All materials are ready for use with their clients as needed.

IdeaLinx

Three IdeaLinx events were held between November 14 and 30 – one each in Prince George, Kamloops and Castlegar. Each event was attended by forty or more participants, representing a cross-section of industry, academic researchers, and government personnel. Feedback after the events was positive with the majority of respondents indicating that they would like to attend similar future events. The events achieved the goal of bringing together three groups that would not typically interact with one another.

The positive response to the MentorLinx and IdeaLinx pilot projects would support their wider implementation.

Recommendations

1. Expand the implementation of both MentorLinx and IdeaLinx in all regions.

The results of the pilot evaluations were positive. The companies that participated benefited from their interactions. The mentors found the experience rewarding. The representatives from industry, academia and government found the networking events valuable and there are initial reports of increased collaboration. The positive outcomes will encourage additional companies to participate in the program.

We recommend offering the programs in all regions on a continuing basis.

2. Increase regional innovation council staff time available for MentorLinx to:

- a. Recruit mentees and orient them to the program
- b. Recruit mentors and provide information on best practices for mentoring
- c. Monitor the matches

The ACT-BC project was funded jointly by Western Economic Diversification and the BC Regional Science and Technology Network. Although there was some funding for administration, there was no funding for additional staff time in the individual councils. They have identified this lack of sufficient staff time as an inhibitor to wider implementation of MentorLinx and IdeaLinx.

We recommend that the regional innovation councils approach both provincial and federal funding agencies for assistance in supporting MentorLinx.

3. Increase regional innovation council staff time available for IdeaLinx to:

- d. Recruit participants
- e. Organize regular events
- f. Follow up and monitor resulting collaboration

The IdeaLinx events helped to create connections between industry, academia, and government which are important precursors to developing collaborative relationships. The regional innovation councils have identified lack of staff time and the cost of mounting the events as challenges with regard to offering these types of events on a regular basis.

We recommend that a combination of funding avenues be explored for continuing these events including approaching provincial and federal funding agencies.

4. Investigate the need to establish an Aboriginal MentorLinx/IdeaLinx Coordinator's position to assist eligible aboriginal technology entrepreneurs.

Interviews with aboriginal stakeholders indicated support for the MentorLinx approach but identified modifications necessary for its successful implementation with aboriginal entrepreneurs. Specifically, there would be a need for a Coordinator to build relationships with the mentors to help them understand the unique needs of aboriginal entrepreneurs. The Coordinator would also need to build relationships with aboriginal agencies so that they would have confidence that when they referred their entrepreneurs to the program, the matches would be well-supported.

We recommend that the need and support for an Aboriginal MentorLinx/IdeaLinx Coordinator be investigated with aboriginal stakeholders and, if indicated, the position be created and implemented.

5. Provide assistance to regional technology companies in identifying and applying for appropriate funding programs and applying for funding.

Companies identified access to financing as an obstacle to their growth. Although they perceived that they were looking for investors, many companies were not investor-ready. While they undertake the process of becoming investor-ready, there are a number of funding programs that could provide some financial help, however companies are often unaware of the programs or, if aware of them, they perceive the application and reporting processes to be onerous.

We recommend that regional innovation councils make the information on the funding programs widely available and provide assistance with the application processes, if necessary.

6. Offer information sessions on funding programs for companies, such as those offered in some regions for SR&ED tax credits, but including other funding programs as well.

In addition to the individual information and assistance recommended in #5 above, presentations on funding programs including who can apply, when, for how much, and then outlining the application and reporting processes could improve the participation of regional companies thereby helping them to grow.

We recommend that presentations of this type be offered once or twice per year in each region.

7. Publish and distribute the MentorLinx materials on access to financing for use by other agencies with a wide range of companies.

Regional innovation councils stated that they felt that it would be beneficial to provide broad access to the materials prepared for this part of the project, particularly the document, *Getting Ready for Investors*.

We recommend this material be made widely available in each region through the innovation councils.

8. Monitoring the Progress That is Made

The ACT-BC project period, May 16 to November 30, 2005, provided sufficient time to develop and pilot the processes, but insufficient time to see longer-term, measurable outcomes.

We recommend that the regional innovation councils continue to monitor the MentorLinx and IdeaLinx pilot participants on a regular basis to identify the ongoing benefits they are receiving from their participation for a period of one year.

Conclusion

The ACT-BC project was designed to address three key obstacles to success outlined in the PIC Report and corroborated by regional high technology studies done since 2003.

The success of the project indicates that continuation of the MentorLinx and IdeaLinx activities would be beneficial to the growth and development of regional technology companies.

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1. Introduction and Background

The economies of rural BC communities are being adversely affected by the cyclical nature of the resource industries on which they depend and by other forces beyond their control, such as the softwood lumber dispute and the pine beetle infestation.

Over the past ten years, an increasing number of technology companies have been established in regional areas to serve the resource sector as well as other clients within and outside the region.

The overall growth of the British Columbia technology sector and its contribution to the provincial economy has been well-documented by the BC Technology Industries Association and Leading Edge BC. However, the technology sector in regional BC is not growing as quickly as in other areas of the province.

In 2003, the PIC Report¹ was commissioned by the BC Regional Science and Technology Network (BCRSTN), with the funding support of Western Economic Diversification (WD) and the Province of British Columbia, to identify ways to increase innovation and the commercialization of technology in rural BC, i.e. the regions of the province outside the Greater Vancouver and the Capital Regional Districts.

In addition, a number of regional technology studies had been conducted and released after the PIC Report which provided additional information on the size and nature of regional technology sectors. (See Appendix I for a listing of reports reviewed.)

From the needs and obstacles identified by technology companies in these documents, three needs emerged as common to all regions:

- Mentoring
- Access to Financing
- Improved Networks between Industry, Researchers and Government

The ACT-BC Project: Assisting the Commercialization of Technology in Rural BC was initiated to identify and implement strategies for addressing these common needs.

The project commenced on May 16, 2005 and ended on December 20, 2005.

ACT-BC was jointly funded by Western Economic Diversification and the BC Regional Science & Technology Network. Both partners recognize that innovation and commercialization are essential to economic growth in rural communities. The Government of Canada, through its Innovation Strategy, recognizes that knowledge is a key competitive advantage. The BC Regional Science & Technology Network members foster business and community growth through the application of science, technology, and innovation. Through the ACT-BC project, they are providing opportunities for technology companies in rural BC to grow and develop.

¹ Promoting Innovation and Commercialization in Rural BC, Ference Weicker, 2003, www.innovate.bc.ca/bcrstn

2. Methodology

The following seven-step approach was used for the ACT-BC project:

1. Verification of regional needs through review of recent studies and stakeholder interviews;
2. Review of models from other jurisdictions including both information available on websites and, where indicated, telephone interviews with program administrators;
3. Development of a proposed model based on knowledge of regional needs and best practices from other jurisdictions;
4. Circulation of draft materials for review and comment by stakeholders;
5. Pilot implementation of the model;
6. Evaluation of project implementation and development of recommendations for change through interviews and meetings with stakeholders and participants.
7. Revision of models as necessary.

2.1 Identifying and Obtaining Relevant Studies and Reports for Review

Seven studies conducted during 2003 and 2004 were selected to provide current details of the needs of regional technology companies.

Two of the studies were province-wide in scope:

- PIC: Promoting Innovation & Commercialization in Rural British Columbia, BC Regional Science and Technology Network, March 2003
- Ramp-Up! – Bringing Out the Best in British Columbia's Regional Economies, 2004

Five of the studies were regionally-focussed:

- Okanagan Technology Industry Study 2005, Okanagan Science & Technology Council
- The Okanagan Partnership – Okanagan Sustainable Prosperity Strategy – Final Report, 2004
- North Central BC Supply Side Analysis, March 2004
- 2004/05 North Central BC High Technology Study, Innovation Resource Centre
- Company Growth and Human Resource Survey of the Kamloops Region Advanced Technology Sector, Technology Kamloops, May 2003

A review of these materials confirmed that the three areas to be addressed in the ACT-BC project were still relevant and a common need in all regions.

2.2 Consultations with Stakeholders

Consultations with stakeholders were conducted in the following ways:

- by telephone
- by email
- in person
- during small group presentations

Telephone Interviews:

- Each interview included a brief overview of the project followed by a discussion of desired outcomes and suggestions from the interviewees.
 - During July and August, telephone interviews were scheduled with the BCRSTN and Advisory Committee members.
 - Telephone consultations with aboriginal representatives took place throughout the project.

Presentations:

- A presentation on the project was made to the ACT-BC Advisory Committee at their meeting in Vancouver on May 16, 2005. At that time, they offered their ideas and input on the project and the outcomes sought.
- A presentation was also made to the BCRSTN members at their Annual General meeting in Vancouver on June 9, 2005.
- A presentation on progress on the project was made to the BCRSTN fall meeting on October 18 in Vancouver.

Throughout the project, input has been solicited from stakeholders at each stage and this feedback has guided the progress of ACT-BC throughout.

2.3 Progress Reporting

Written reports were provided to the Advisory Committee Chair every two weeks.

In person progress updates were done monthly except for July and November.

2.4 Identification of Existing Models

Throughout the project, following four-step process was used:

1. A detailed search of the internet, input from stakeholders and other sources to assist in identifying existing models;
2. Use of specific criteria to create a short list of those that most closely matched regional needs;
3. A detailed review of those that most closely matched our criteria followed by a more detailed review of them;
4. Telephone interviews with program administrators where appropriate.

3. Aboriginal Engagement Strategy and Consultations

Economic and business development services are provided to the rural British Columbia aboriginal population by a network of service providers strategically located throughout the province.

There are three main categories of service providers, each of which has a slightly different mandate and resource capacity but whose mandate is to meet the needs of our targeted client for the ACT-BC project – the chief executive officers of technology firms that are at revenue, or near revenue.

The service providers are:

- Aboriginal Capital Corporations that provide a range of business planning and development lending services (over 10 in BC).
- Aboriginal Community Futures Development Corporations (CF) that provide business loans to current or prospective entrepreneurs. While services may vary from CF to CF they all provide some business planning, training and counselling services (3 aboriginal-specific CF's plus another 30 providing services to all entrepreneurs).
- Business Advisory Centres are designed to ensure that aboriginal entrepreneurs have access to business support and advisory services including business planning, market research, financing, operations and expansion strategies (3 in rural BC).

3.1 Review of Needs Analysis

In February 2000, the Centre for Community Economic Development at Simon Fraser University was commissioned by Western Economic Diversification Canada and the Ministry of Small Business, Tourism and Culture to determine the business information needs of Aboriginal entrepreneurs and service providers. The resulting report, *“Assessing the Business Information Needs for Aboriginals in British Columbia,”* highlighted the following items and issues as they apply to the use and commercialization of technology:

- Aboriginal entrepreneurs face many challenges including difficulty in accessing capital, geographic and social isolation, a small and weak aboriginal private sector and a lack of acceptance, respect and support in both aboriginal and non-aboriginal communities.
- Information accompanied by education and skills training is required at both the start-up and ongoing operation stages.
- Skill development requirements included marketing, financial management and the use of information technology tools.
- Many aboriginal entrepreneurs have a fragile sense of confidence and want to get information in person or in seminars rather than via the internet.
- While entrepreneurs prefer one-on-one contact, providers suggest that funding limitations impact their ability to offer personalized service.
- The available information and information delivery services are primarily oriented to the start-up entrepreneur, with few programs targeted to businesses once they are up and running.
- Business associations, mentoring and networking play a key role in supporting the established entrepreneur.

- The following knowledge gaps were identified:
 - Aboriginal-specific financing
 - Where to go for mentoring
 - Information on sources of capital, new business opportunities and other information often gleaned from informal networks
- Respondents emphasized the need for service providers to focus more on aftercare to ensure the ongoing success of the entrepreneur and the business
- The following gaps in service delivery were identified:
 - Entrepreneurs expressed a strong preference for one-on-one business counselling, yet few service providers could take the necessary time to provide one-on-one mentoring and support.
 - Entrepreneurs stated they were often left to drift.
 - Entrepreneurs want to become a part of networks that offer support and connect them with their peers, mentors and the non-Aboriginal business community, yet these formal business networks are weak among aboriginal entrepreneurs.
 - Among some service providers there was a lack of respect and understanding of the unique challenges, abilities and circumstances of aboriginal entrepreneurs.
 - Aboriginal entrepreneurs often find it difficult to find the moral support or business loyalty on-reserve.
 - Northern and remote areas are particularly underserved.
- The following gaps in communication were identified:
 - Many Aboriginal Economic Development Officers are isolated and cut off from information sources. They need to be brought into networks that supply them with information, training and support.
 - Gaps in communication were identified between government agencies, between service providers and government and between service providers themselves.
 - An integrated strategy is lacking for the acquisition of funding and distribution of information to support aboriginal entrepreneurs and aboriginal economic development.
 - There has been insufficient building of networks and partnerships among providers.

3.2 Summary of Aboriginal Consultations

The following five representatives from Aboriginal agencies were interviewed. The full notes from the interviews are contained in Appendix J.

- Ray Gerow, President and CEO, Aboriginal Business Development Association, Prince George
- Art Mercer, Economic Development Officer, Nisga'a Lisims Government
- Kevin Schindelka, National Aboriginal Capital Association
- Katherine Robinson, Nuu Chal Nuth Tribal Council

- Gerri Collins, General Manager, Central Interior First Nations CFDC

They offered the following observations and suggestions:

- There is a need for MentorLinx for aboriginal technology entrepreneurs.
- Aboriginal clients would require a longer relationship-building component between the mentor and mentee than is currently outlined in the MentorLinx program.
- There would need to be a mechanism to allow both the mentee and the aboriginal business service provider to build trust and confidence in the mentoring matches.
- Consider developing an aboriginal component to the program that would provide an aboriginal MentorLinx Coordinator who would explain the program, build trusting relationships with the service providers, make the matches and administer the program.
- Mentors would need to work with the aboriginal entrepreneurs through a series of incremental changes until the desired result was achieved. A true transfer of capacity is desired.
- Mentors would need to understand that individuals learn in different ways.

A recommendation is included in this report to investigate the development of an Aboriginal MentorLinx Coordinator position.

4. Sources of Additional Funding for Program Development

Sources of funding for program development relating to the ACT-BC objectives include:

Western Economic Diversification

Most programs that were closest to ACT-BC's objectives involved funding from Western Diversification (WD), which is already a partner on this project with the BCRSTN.

National Research Council

The National Research Council (NRC) funds some projects in other provinces that appear to be similar to ACT-BC. Ongoing funding is not available through NRC, however they will consider funding for appropriate one-time projects.

Human Resources Development Canada – Workplace Skills Initiative

One specific program, the Workplace Skills Initiative (WSI) from Human Resources and Skills Development Canada (HRSDC), was explored in considerable detail. The consultants spoke to an HRSDC representative about whether or not ACT-BC would be suitable for funding under the WSI and were encouraged to submit a one-page concept paper outlining the objectives of ACT-BC.

The consultants drafted the concept document and presented it to the BCRSTN members for their review and approval at their meeting in Vancouver on Oct. 18, 2005.

Receiving approval, the consultants submitted the one-page concept document to the HRSDC Workplace Skills Initiative contact person.

The BCRSTN members also approved the development and submission of a detailed proposal to the WSI program by the October 31 deadline, and this was done.

Canadian Rural Partnerships – Network Initiative Program

A source of small amounts of funding is the Canadian Rural Partnership, Networking Initiative Program which runs until March 2007. Initial conversations with the program staff did not rule out funding, but the ACT results were not defined enough at the time of investigation to discuss funding potential in any detail.

The contact there is Janine Gyug, Program Officer, Rural Secretariat, Agriculture and Agri-Food Canada, 604-666-7903.

5. Sources of Funding for Companies

An extensive review of funding programs available to technology companies was undertaken. The results have been divided into the following categories:

- Science & Technology Research and Development Programs
- Employment Programs
- Economic/Business Development Funding

Also included is a listing of the venture capital companies and the industry sectors in which they may make investments as well as a link to their websites.

The complete information is provided as a separate document, *Funding Program Review*. While it contains summary information, it directs readers to the program websites for up-to-date information.

The cited links should be consulted for additional program details and requirements as the programs change on an on-going basis.

Not included in the final report are:

- micro-financing programs;
- summer student employment programs;
- employment programs restricted to jobs in the public sector;
- programs that were ending before November 30, 2005.

6. ACT 1 – MentorLinx: Rural S & T Business Mentoring

6.1 Review of Existing Mentoring Programs

6.1.1 Key Considerations for a Mentoring Program

Key components for a mentoring program have been derived from generic mentoring literature, review of specific mentoring programs, and interviews with existing program managers. In keeping with this project, the focus is on mentoring for development of business skills (as opposed to personal growth or life coaching services).

The mentoring programs reviewed were those that had one or more characteristics matching the project target of:

- being appropriate for technology company CEOs;
- being accessible in rural areas;
- having been in operation for several years;
- having legal documents/forms;
- involving no pay for mentors; and
- using technology to assist in mentor-mentee interactions or program management.

Few programs met all the criteria, but many had relevant components that were instructive for our project purposes.

Sixteen were identified that warranted a closer look.

For the following seven, a detailed review was conducted, including interviews with the program managers where possible.

- Business in the Community – New Zealand
- Business Mentoring Northwest – Northern Ontario
- Entrepreneurs Forum - Maritimes
- Mentors Online - Australia
- Rocket Academy - Vancouver
- Telus NewVentures BC - Vancouver
- Association of Professional Engineers, Geologists and Geophysicists of Alberta Mentoring Program - Alberta

The following nine, although having interesting elements, were not seen to be as relevant to ACT 1.

- AceTech
- Biomedical Commercialization Canada Inc.
- BC Human Resources Management Association's Professional Mentoring Program
- CONNECT Denmark
- Export E-Mentoring Pilot
- Inno-centre Alberta
- Mentoring for Growth
- SCORE (Service Corps of Retired Executives)
- Women's Enterprise Society of BC Peer Mentoring Groups

The detailed information is contained in a separate document, *Research on Mentoring Programs*, which has been submitted with this report (see Appendix D).

6.1.2 Defining and Monitoring Success

Six Core Standards have been identified by International Standards for Mentoring Programmes in Employment which are also applicable to mentoring programs in our context. The Six Core Standards are:

1. Clarity of purpose
2. Stakeholder training and briefing
3. Processes for selection and matching
4. Processes for measurement and review
5. Maintenance of high standards of ethics
6. Administration and support

Most programs outlined program purpose and goals on their web sites, and some included mission and vision statements for the program.

Ideally, the program should be monitored on various levels. Baseline data are important for proper evaluation of outcomes. Ensuring that there is adequate time in the program before making conclusions about outcomes is another consideration. Frequency and duration of monitoring must be determined. Some model examples:

- CONNECT Denmark, Business Mentoring Northwest (Ontario) and Mentors Online (Australia) provide mission and vision statements on their web sites.
- Business in the Community, New Zealand has established best practices (e.g. matches are to be made within five days), and a web-based management tool is used to monitor and report on program activities to see if practice standards are met. BITC also hires KPMG to administer a client satisfaction survey three times a year to clients who have completed/closed their mentoring. Outcomes are measured by success stories of clients.
- Rocket Builders, BC have included a systematic means of collecting specific business metrics in their model. They plan to conduct pre-assessments (e.g. number of customers, revenue, size of sales funnel, lengths of sales cycle, etc.), do assessments of program participation to determine level of engagement and completion of program components, conduct a post-program interview and survey to collect business metrics for comparison with the pre-assessment, and do a follow-up survey one year after the program to collect business metrics again.

6.1.3 Type or Form of Mentoring

There are many forms of mentoring and various terms used to describe the relationships. While one-on-one mentoring is a common model, another option is peer groups that get together to discuss issues and learn from each other. A panel of mentors is another important model. It involves mentors who listen to presentations pertaining to various aspects of business and provide feedback, advice and constructive criticism to the presenter. Combinations of the above models are also implemented (e.g. one mentor coaching more than one mentee, two or three mentors working with one mentee, or one mentee working with a company team). No one model is superior to another, but its effectiveness may depend on the goals of the program, the players involved, and the profile of the business owner, such as his/her business stage and needs, as well as issues such as his/her locale, which may affect ability to participate in some activities.

6.1.4 Commitment Required of Mentors and Mentees

Commitment of both mentor and mentee are key factors for success. Commitment can be in the form of a specified length of time, which is often six months to a year or for a specified task or set of meetings

(e.g. three meetings to review a particular business plan/issue). Commitment should also specify the level of participation expected (e.g. all sessions of a peer mentoring group for a period of six months) and the minimum time commitment (e.g. two hours per month). Commitment to program standards and guidelines is also critical. Developing a code of conduct as well as role descriptions is important. Some model examples:

- Business in the Community, New Zealand – Mentors specify their availability and time commitment and then a web-based management tool is used to track activity with mentees. The web site explains what a mentor is and the kind of characteristics sought.
- Entrepreneurs' Forum, Maritimes – Mentoring is primarily in the form of advisory panels; members commit to the panel, but do not have obligations beyond that.
- Telus NewVentures, B.C. – Mentors can be team mentors or panel mentors. Team mentors are asked to attend a minimum of three meetings with their team. All participants must adhere to a code of conduct and ethics.
- Women's Enterprise Society Peer Mentoring – Attendance at all sessions is mandatory. If a participant has to miss a meeting for some reason, it is her responsibility to cancel the meeting and make all rescheduling arrangements.
- Business Mentoring Northwest's VentreNous Peer Mentoring, Ontario – The orientation meeting introduces the three C's of Commitment to attend, Confidentiality of information shared and Communication style, and these principles are consistently upheld.

6.1.5 Eligibility Criteria for Mentees

Stage of business and seriousness of commitment are important eligibility considerations. A mentoring program can assist a business at any stage, but program managers caution that it is important to ensure that the business, even if at an early stage, is committed to moving forward.

Openness to advice is an important characteristic for mentees. Our research found that this openness is necessary for a mentee to benefit from a mentoring relationship (and lack of openness is also identified as a reason for business failures). The strong will and determination of an entrepreneur needs to be balanced with a willingness to listen.

Geographical eligibility criteria must be specified. This is particularly important when participants can apply on-line from anywhere.

Some model examples:

- Business in the Community accepts companies in operation for at least six months, who can show evidence of accounts, including sales turnover. The company can be from anywhere in New Zealand.
- Entrepreneurs' Forum staff members hold an initial consultation with applicants to assess the situation. This includes determining the applicant's readiness to accept advice and feedback. The program serves clients in Nova Scotia, PEI and Newfoundland.
- CONNECT Denmark's staff also meet with applicants, with two different advisory panel processes, depending on the business stage. Clients come from all over Denmark.
- Telus NewVentures has four subsequent rounds of competition. Standard eligibility criteria are used to determine who is accepted in the first round, but it is only in the third round that the remaining, stronger teams are matched with mentors. Teams must include at least one person

with a permanent residence in B.C. and, if the participant is a business, the majority of its activities must be in B.C.

- Business Mentoring Northwest serves an area of about 300 km in all directions from the program's office location in Dryden, Ontario.
- Mentors Online serves Association members all across Australia. Applicants must have a business plan and agree to various program guidelines and principles (amongst various other criteria) before being accepted.

6.1.6 Eligibility Criteria for Mentors

Selection of mentors is a critical factor for success. Most programs have application processes which include forms detailing work history, areas of expertise and level of availability.

In general, mentors should be people who want to help and give back, are good listeners, encouraging, able to build a relationship, willing to share their expertise and networks, able to be forthright (tell it like it is in a constructive way) and adept at suggesting, guiding, challenging and walking alongside rather than making the mentee's decisions or doing the work.

Some mentors come from large corporations and others from an entrepreneurial background. Some are retired or semi-retired, and others are still very active in their career. A few are professional consultants. The key is not the type of business, but rather the type of experience and skill set (along with the motivation of helping people rather than trying to solicit business).

The program manager needs to verify the credibility of the mentor. Some applications request references. In other programs, the coordinator relies on networks in the community and personal contacts to find out about mentors. Some mentors are already very well known and further checks are not needed.

A common theme from program managers working with technology companies is that the technology is the easiest aspect of the business, because most clients are highly-skilled in their field. The greatest lack is in business skills, so when seeking out mentors, the most important need is for people with expertise in business areas.

Participation should always be voluntary. It is a recipe for failure to enlist someone who is not committed to the process and/or does not really understand it.

6.1.7 Matching Process

Making the match is of paramount importance in the mentoring process. Program managers repeatedly commented on the importance of the human touch in the matching process. Although there is software that can do this, existing programs emphasized the need for human intervention to ensure a good match based not only on expertise and needs, but also on personality and compatibility. Matches should be made as quickly as possible.

It is helpful to have more than the exact number of mentors needed for a program. This allows more choice in the matching process and a better chance for a good fit.

In addition to the human touch, programs need some way to organize the profile information and track activities. Most programs have on-line application processes and electronic means of storing this information. Some software systems also have activity monitoring/tracking capabilities.

In our research, most programs served a fairly broad area. Access to the program in rural areas can be facilitated through networks of contact points, e-mail, toll-free phone numbers, some travel, and web access to application forms, program information and mentoring resources.

Confidentiality is a concern, especially in rural areas. A common challenge in smaller locales is that the most suitable mentor may be a competitor and/or most of the mentors may know or be known by the mentee. Written confidentiality agreements are also very common in mentoring programs.

Once a match is made, most programs leave the mentor and mentee to work out the actual mentoring arrangements. The relationship needs structure but should not be over-managed.

A mentor may have one or more mentees, based on the amount of time commitment the mentor wants to make. In the case of mentees, most programs allow the mentee to request another panel or another mentor when the first relationship is finished.

One success factor cited by various programs is the need for the mentor to make at least one site visit to the mentee's business. The mentor needs to get a feel for the business and see it from his/her perspective, not just from the mentee's description.

When the mentoring relationship ends, there must be some means of indicating closure, and it is advisable to have an assessment of some sort to get feedback on both outputs and outcomes.

Some model examples that illustrate the above points:

- APEGGA, Alberta – The software system is able to make matches, but matches are made by the Program Manager and have been more successful than those initially made by the software. The software keeps a lot of information and tracks program activities. E-mail has been quite effective as a means of communication for mentors and protégés living in different locales.
- Business in the Community, New Zealand – A software system is used to record program activity, monitor adherence to quality standards, house profile information, produce reports, etc., but matches are made by people. Even if matches are not in the same city, the program encourages participants to make at least one site visit. BITC connects with the rural areas through eight regional contracted agencies, a web site and toll-free numbers. Mentors enter the end or completion of a match in the system, and a survey is sent out to clients who have completed a match.
- Entrepreneur's Forum – The client agrees to the identity of panel members before its composition is finalized. In Newfoundland, a new expansion area for the program, video-teleconferencing is being piloted as one means of service delivery in more rural locations. After a panel, follow-up on outcomes is done at specified periods for two years.
- Business Mentoring Northwest – Confidentiality is a major concern for participants. Cross-regional matches are very common, a signed confidentiality form is used and mentors and mentees are constantly reminded by the Program Manager about the importance of confidentiality.
- Mentors Online is an e-mentoring program, but matches are still done by the program manager. The program has an extensive web site with program forms and procedures as well as mentoring resources and training.

6.1.8 Training/Orientation for Mentors and Mentees

There is general consensus in our research that some form of orientation is essential. One program in existence for a year started without orientation for mentors/mentees, and has now initiated training because they found it to be an important component for the program's success.

In addition to providing training on how to build a relationship—initiating it, building trust, negotiating—it is important to train the participants on how to reach closure at an appropriate time.

Model examples:

- Business in the Community, New Zealand is designing professional development for mentors in the form of three half-day seminars with eight modules. A seminar will be offered every three months. This will be mandatory for new mentors. Existing mentors are contributing to the course content.
- Rocket Builders is putting together a manual for coaches.
- BC's Human Resource Management Association is delivering full-day mentor/mentee workshops around the province.
- Entrepreneurs' Forum's staff members provide orientation through the initial consultations with clients and through the preparation for the mentor panel sessions.
- APEGGA has a lengthy handbook available on the web site.
- Mentors Online has mentoring tutorials which all mentees and mentors must take prior to sending in the registration form. There is one core module completed by everyone, and then a mentee module and a mentor module. Participants also must read succinct documents on expectations for a mentor/mentee, and guidelines for communication.

6.1.9 Cost to Participants

Regardless of whether the mentors and/or facilitators are paid, charging a fee to mentees can positively impact commitment and perceived value, and may also be necessary to help cover the administrative costs of operating the program.

Programs in which experienced mentors were working with less experienced business owners provided services at no cost. In the case of peer mentoring and/or CEO round tables, a fee was sometimes, though not always, charged. Fees were also common for private consulting firms offering mentoring as one of their services.

6.1.10 Promotion and Recruitment

Many recruitment strategies were common across programs, and included web sites, presentations in the business community, personal contact with businesses, networking with other agencies who could promote the program in their locale, television and radio advertising and press releases, as well as word-of-mouth referrals from past and existing participants and sponsors.

One critical factor for success in a mentoring program is to have some well-connected champions from the business sector. These people lend credibility to the program, often act as mentors and are also effective in convincing other influential business people in their networks to get involved. Their companies are often sponsors, providing valuable monetary and in-kind support.

Staff members should also be well-connected. Without these connections and familiarity with the mentors, it is difficult to put the right mix of people together.

The mentoring relationship must provide value for both the mentor and mentee, and these must be constantly marketed. Frequently cited benefits to mentors include access to innovations, sense of self-worth and satisfaction, skills and knowledge development, recognition, network expansion, and professional renewal. Mentors often report that they learn a lot from the mentoring experience.

Frequently-reported benefits to mentees include help in re-focusing, development of skills and knowledge, increased confidence, access to people with expertise and influence, a wider network, a greater awareness of challenges and opportunities, and a relationship with someone who will listen and provide support.

Starting with a pilot or a small number of participants is a positive way to begin a mentoring program. Slow but steady growth allows for the development of a solid foundation and the integration of lessons learned, while building up a reputation and roster of mentors and mentees.

Model Examples:

6.1.11 Documentation/Forms and Program Structure

Programs have their own sets of documents and operating manuals. In general, there are:

- Application forms and processes for mentors and mentees, which include eligibility criteria
- Contracts or agreements between the mentors and mentees
- Processes and forms for dealing with confidentiality and liability/indemnity
- Policies surrounding remunerated engagement of mentors (if mentors are unpaid in the program). This is particularly important when a mentor is also a consultant or professional advisor.

Often the application process specifies a code of conduct and/or list of general responsibilities the mentor and mentee are expected to fulfill during the mentoring process.

Other important pieces of advice about structure/documentation from one or more program managers are:

- The mentor and mentee need to set goals, objectives and timelines so that they are working towards something specific and can measure progress, because there is a link between success and some formalized structure.
- Evaluation mechanisms are critical. To ensure that measurement of outcomes is possible, it is necessary to have some client assessment prior to, during and after the mentoring.
- Creating mission, vision and goal statements helps to define program success, and once these are established, it is important to stick to them.
- Training and orientation are critical, and enhance the effectiveness of the mentoring relationship. This may include written, on-line and/or workshop formats.

6.1.12 Corporate Structure, Staffing and Alliances

Programs can be run as part of an existing organization or as separate legal entities. Most programs reviewed were operating as separate entities. All programs reviewed had at least one staff person in place. Many were making effective use of networks and community agencies to help promote the program, administer aspects of it and ensure regional coverage, but in all cases there was at least one person responsible for overall coordination.

In order to reach a geographically dispersed area, it is also valuable to have agencies or staff who are outside of a central location and able to interact with clients. Some programs partner with other existing services, and there is a mutual, informal referral system in place.

Model examples:

- Business in the Community is a non-profit, tax-exempt company which is the operating arm of a charitable trust. There is a head office with the Chief Executive and four other staff. In addition, BITC has formalized partnerships with fourteen agencies throughout New Zealand (primarily Chambers of Commerce and Economic Development Agencies), who run the program for a per-match payment and incentive bonuses based on performance.
- Entrepreneurs' Forum is a non-profit society. The head office is in Nova Scotia, with an Executive Director. Staff are located in Nova Scotia, PEI and Newfoundland. EF complements the activities of the National Research Council's Industrial Technology Advisor, and mutual referrals take place (although this is not the only source of clients). EF is funded, in part, by the NRC.
- Business Mentoring Northwest is located in the Patricia Area Community Endeavors (PACE) office, and is administered and governed by PACE, but operates as a separate entity with a separate bank account. There is one full-time program coordinator who forges relationships with agencies in her region, and these agencies in turn help to promote the program.
- CONNECT Denmark has a Director and three other staff members in a head office. Five additional staff members are each located in a different area of Denmark. The program is establishing arrangements with business community councils, who are helping to ensure a more effective reach to the business community.

6.1.13 Funding Sources and Fundraising

Most programs surveyed had private sector funding along with some government assistance. Two important ingredients for securing private sector support are:

- having champions from the business community advocating on behalf of the program, and
- understanding how to market to business (i.e. promoting the benefits they see as valuable).

Model examples:

- Entrepreneurs' Forum receives funding from government organizations and the private sector.
- Business in the Community receives on average approximately 60% of its \$2 M budget from the private sector. It also receives a substantial amount of in-kind support from private sector patrons. The program has established a patron support system with four tiers, each having associated benefits. At its inception, very influential business people started the BITC program, and it was funded entirely by the private sector.
- Rocket Builders participated in a cost-sharing arrangement with the National Research Council to do some background studies and develop a program framework. The content of the program is proprietary, and the operation of the program itself will be funded through the fees of participants.
- Business Mentoring Northwest was started with government funding (approximately \$90,000), but other support will have to be and is being secured to sustain the program in future years.

6.1.14 Use of Technology

Interactions between mentors and mentees are generally low tech in nature (e.g. e-mail, phone, in-person), and our research consistently showed that some face-to-face contact is valuable, even if it is only an occasional visit.

A program management software system can make specific information available to select audiences. Some information may be public and posted on the web site. Other material, such as certain resource materials, may be accessible only to mentors. Performance data and reporting may be shared with certain agencies and/or staff. Having a system with this level of flexibility and this variety of content can be quite powerful.

All programs reviewed had web sites (which in some cases are tied into the management software systems). Almost all of these had on-line application forms for mentors and mentees. Other common sections were: an organizational about us section; a program overview; program history/background; mentor and mentee sections (e.g. Why should I be a mentor? What is mentoring?) and associated guidelines/responsibilities, resource material and links related to mentoring, press releases and success stories of past clients, contact information, lists of sponsors and links to their sites. The mentoring sections of a web site may only be one part of a larger web site for those organizations offering various services.

Model examples:

- Queensland Export E-Mentoring pilot program and Business Mentoring Northwest found that clients preferred to use their own e-mail systems rather than the one provided through the program's site.
- Entrepreneurs' Forum is piloting the use of video-conferencing for their mentor panel sessions in Newfoundland.
- APEGGA found that matches made using software did not work out as well as those made by the program manager.
- Business in the Community has invested over \$200,000 in the development of a web system that acts as a public interface, program promotion and mentor/mentee application point, but also has extensive non-public components: (1) mentor resources in the form of business planning aids, information on business assistance, a bulletin board and benchmarking statistics for 190 sectors; (2) management and accountability systems used to monitor delivery agency activity, house mentor information (each agency has its own silo of mentors), track mentor/mentee activity entered by mentors, produce required reports for government, etc. This system is a key factor in the success of the program, and allows for continual program quality monitoring and improvement.
- Mentors Online offers 14-week e-mentoring matches between less and more experienced Association members who are in self-managing work arrangements. Applicants submit detailed applications, and the matches are made personally by the program manager.

6.2 The MentorLinx Model

Based on our review of regional needs, our interviews with stakeholders and our initial research on the needs of companies, the following four characteristics that guided the development of the mentoring model were identified. The resulting program, MentorLinx, had to be:

- Available to CEOs in all regions of the province
- Incremental, i.e. not duplicate programs already available in the regions

- Able to assist an underserved group of companies, those that were past initial start-up and wanted to grow their companies
- Able to be administered in the long term by the regional innovation councils themselves

Three types of mentoring were considered:

- peer mentoring groups
- panel mentoring
- 1:1 mentoring

Of the three, only 1:1 mentoring was incremental in all regions.

In order to be available in all regions within the project budget, MentorLinx used technology for the regular meetings, i.e. telephone, email, VoIP, etc. rather than face-to-face contact. Mentors and mentees were encouraged to meet face-to-face if they were going to be near one another for other business reasons.

Mentees are the Chief Executive Officers (CEOs) of rural, technology companies. Generally, these CEOs (mentees) have already utilized the resources available to them in the region and now required expertise and wisdom not locally available. Their companies have been in operation for a period of time, are at revenue or near revenue stage, and have a growth orientation. They want additional insight that will help them achieve that growth. The companies they lead may be in any sector, but have developed unique technology that they are commercializing.

Mentors are volunteers, from all parts of the province, with wisdom and business experience they are willing to share. They generally have hands-on CEO level experience, usually in technology companies, with at least two to three years' more experience than the mentees. They are people with good interpersonal communication skills and will usually have participated in the mentor orientation program. The initial group approached were those who had participated in the Advanced Systems Institute's Business Advisory Board process. Additional mentors would be recruited by the regional innovation councils and vetted by them.

Mentees were recruited by the regional innovation councils from the technology companies in their regions. The NRC IRAP ITAs were also encouraged to have their clients contact the regional councils about being matched with a mentor.

A draft of the proposed MentorLinx model was circulated to stakeholders for review and feedback.

6.2.1 MentorLinx Vision, Mission and Goal

The **vision** is that technology companies located in rural BC are able to develop, thrive and prosper in their home communities.

The **mission** of the program is to assist rural technology companies to grow by linking the CEOs (mentees) to the expertise and wisdom of more experienced CEOs (mentors) thereby connecting them to the advice and support they need.

The **goal** of the program is that mentors will act as sounding boards for the mentees and help them identify alternatives and resources as they make decisions on how to grow their companies.

The MentorLinx: Business Mentoring Program matches the Chief Executive Officers (CEOs) of rural, technology companies with mentors who have usually been the CEOs of successful technology companies, have experience as mentors and are willing to share their knowledge, expertise and wisdom.

This program was administered by the consulting team during the pilot stage and will be administered by the regional innovation councils on an ongoing basis.

6.3 Regional Orientation Sessions

To introduce the model to the regional innovation council staff as well as prospective mentors and mentees, eight Regional Orientation Sessions were scheduled, one in each region during August and the first half of September.

- Prince George	August 11
- Kelowna	August 16
- Invermere/Cranbrook	August 17/18
- Nanaimo	August 29
- Fort St. John	August 31
- Castlegar	September 14
- Kamloops	September 18
- Terrace	September 20

Each orientation session was designed to include a separate session for the staff, followed by a general session for mentors, mentees and other community stakeholders. At the end of each session, participants were encouraged to provide feedback on the model and to consider registering as a mentor or mentee.

Originally, the registration forms, confidentiality agreements and release of liability forms were provided to participants as paper copies, but a simple, prototype on-line registration system was implemented for the pilot that provided better access.

Mentees completed a document introducing themselves, their company and the problem they wished to work on, as well as a confidentiality agreement and release of liability. When paper forms were used, the information was transferred to the web by the consultant.

Prospective mentees were then interviewed by either the consultant or the regional innovation council staff to discuss the problem they specifically wanted to address during their mentor match and to ensure that they had accessed all local resources available to them first. This approach was used for two reasons. Often companies are not aware of the resources available locally. If help could be obtained locally, then the mentors' time could be used to help with problems requiring outside assistance.

Mentors were interviewed by the consultant to ensure that they understood the intent of the program, that they would be committed to the match for the pilot period, and that they understood the stage of business each mentee would be at as well as the types of issues with which they would be looking for help.

Mentors were asked to commit for a period of three months and to two calls per month, each to be about an hour in length.

6.4 The Pilot Phase

The pilot phase took place from September to the end of November, 2005.

During that time, a total of 8 matches were made – three in the West Kootenay, one in the East Kootenay, two in North Central BC, one on Vancouver Island, and one in the Okanagan.

One match, in the Fort St. John area, was not completed due to the mentee's work pressures during this time of the year.

Seven additional mentors were ready and willing to participate as needed. MentorLinx was designed to respond to mentee referrals made by the regional innovation councils. There were fewer referrals during the pilot phase than anticipated. This may be due to the timing of the project which took place over the summer and early fall.

6.4.1 Making the Match

The process used for making the match was as follows:

- The mentee registration form was reviewed and they were called by the consultant to clarify the goal they had for the mentor match.
- A potential mentor was contacted by the consultant and given a brief description of the problem and asked if they would be interested in working on it.
- If they agreed, then the mentee was given some information about the mentor and asked if they would like to be matched with that person.
- If they agreed, an introductory call was scheduled between the mentor, mentee and the consultant.
- During the introductory call, the consultant reviewed key aspects of the program, paying particular attention to confidentiality, the stipulation that there be no financial transactions between mentors and mentees during the match, and other key points.
- The purpose of the introductory call was to ensure that clear expectations were set for the match and to provide an opportunity for either participant to ask questions. (See detailed information and the script for the introductory call in the document *MentorLinx: The ACT-BC Rural Science & Technology Business Mentoring Program – Orientation* included in Appendix F.)
- Subsequent calls were initiated by the mentee to the mentor at agreed-upon intervals and a mutually-convenient times.
- The following perpetual agenda was recommended for each call:
 - progress on action items from the last meeting
 - how the mentor's information or advice during the last call was helpful
 - obstacles encountered
 - assistance and adjustments required
 - action items to be accomplished before the next meeting

6.4.2 Monitoring the Matches

The consultant checked back with each of the mentors and mentees following their first call to determine how well it had gone and to find out if they wanted to continue with the match. In each case, they said it had gone well and they wanted to continue. None of the matches ended before the end of the pilot phase.

Monitoring information will be turned over to the regional councils in whose regions there are current matches, so that they can continue the monitoring process.

6.4.3 Feedback from Mentees, Mentors and Other Stakeholders

Following are comments collected during MentorLinx:

From Mentors:

- Mentors appreciated the MentorLinx program features that vetted the prospective mentees and outlined expectations, etc. before the match was made. They also appreciated being able to say yes or no to a match based on the need outlined by the prospective mentee, rather than simply being assigned a mentee. One mentor said the matching process was quick and transparent from the mentor's perspective.
- The ten mentors who attended the Oct. 18, 2006 meeting in Vancouver, appreciated the opportunity to meet the regional councils, other mentors and stakeholders.
- Some mentors felt hampered by not having had at least one face-to-face meeting with their mentees. Three of the eight matches did manage to meet face-to-face. The biggest challenge when only meeting virtually is to get a clear picture of what the mentee wants and this could be better done with a face-to-face meeting where the use of a whiteboard would help during brainstorming and discussion. Funding for travel for this type of meeting would be desirable.
- Mentors said that they felt that the mentees who have used the MentorLinx program have the right characteristics – motivation and desire to grow – to benefit from the program.
- Mentors felt that the mentees appear to be in the classic Catch-22 situation where they really need to take time to focus on the business so they can direct their scarce resources effectively, but they have difficulty taking the time out to do so.
- Some mentors have connected their mentees to people from the mentor's network and helped the mentee to leverage these contacts.
- In general, mentors reported that mentees seem naïve about the basic Business 101 stuff they should know, e.g. market research and competitive analysis. In some cases, they believe their product is unique but if they had done wider research, they would be aware that it is not only not unique, but does not have the potential to be a market leader. Companies are making big decisions on far too little information – they just have an idea and go out and do it.
- Some mentors have commented that the mentees may lack the passion and desire to take their companies to the point of truly being able to compete with provincial, national and international companies.
- Some mentors have asked that benchmarks be prepared so that they will know how their match is progressing when compared to other matches.
- Overall, mentors felt that three months is a very short time in which to develop rapport with the mentees and that two one-hour calls per month was insufficient time.

- Mentors found it a challenge to quickly identify one area of the mentee's business to focus on. Mentees often needed help in more than one area of their business
- Mentors found that often the problem stated in the introductory call is not the key issue needing attention.
- Mentors felt that the SMART goal is an important step in helping to focus the conversations, but most mentees did not have a clear SMART goal before the match was made.
- Mentors felt that mentees need to make a greater effort to connect with industry leaders and attend networking sessions to increase their understanding of their industry and what is happening in it.
- One mentor suggested that adding panel mentoring sessions, such as the former ASI's Business Advisory Board sessions, would add a valuable dimension to the program.
- The mentors appreciated that the mentees were respectful of their time.
- Would be helpful to have a definition of best practices for mentoring/coaching and share these with the mentor. Each mentor has their own individual styles for coaching and is curious to learn from others how they coach, how they work with their mentees.
- It would be useful to determine ahead of time what the needs of each mentee are, and to work within a structure that best addresses the needs of the mentee while leveraging the skills of the mentor.
- Too long was spent during the first two or three calls on determining what the mentee needed so that there was less time for actually working on the issues.
- A three-month pilot is just a warm-up, the process needs to be longer in order for the mentee to derive benefits.
- It would have been beneficial to have a summary of the mentee's main issues prior to the beginning of the mentoring relationship.

From Mentees:

- One company said that theirs was a perfect match and that as a result they had re-examined their sales and marketing strategy and were very happy with their new focus. They also had a new way to approach their overall business plan and both partners were very happy with the direction the company was going as a result of the input from their mentor.
- One mentee went to Acetech in Vancouver on the advice of his mentor. He had dinner with the mentor and a colleague which he said was a great opportunity to discuss what I learned at Acetech and review (the colleague's) success with building up and selling the (business name) software company.
- Mentees were happy with their matches and many reported that, after the first phone call, they had new ideas for approaching the problems they had discussed with the mentor.
- While the perpetual agenda provided a focal point, it was generally not used during the mentoring calls, although some are planning to use it more now that they have had time to develop rapport and agree on the key issue(s) to work on.

- In seven out of the eight matches, mentees were encouraged to contact their mentors more often than twice per month. Mentees appreciated this flexibility but were careful not to abuse the privilege.
- One mentee said that the mentor provided a disinterested 3rd party that they could talk to, which was particularly important to them when discussing partnership and human resources issues.
- Mentees felt that the mentors were good listeners who provided good suggestions and feedback and were effective at providing a sounding board for the CEO.
- One mentee commented that he really appreciated the feedback from his MentorLinx mentor. It has helped him to understand where he needed to focus, encourages him to stay on task, and move forward. The mentee compared it to another mentoring experience he had through Microsoft's Independent Software Vendor (ISV) program in which he had experienced a great deal of frustration and wasted time. By contrast, MentorLinx had been beneficial right from the start.
- One match used Skype for their regular connection and highly recommended that others consider it.
- Following the completion of his three-month one-to-one match, one mentee suggested that he would appreciate a panel mentoring opportunity as a follow-up.
- One mentee commented that, although the mentor he was matched with was someone he had wanted to approach, he would probably not have done it on his own as he assumed the person was too busy. He was very pleased with their interactions.
- Mentees appreciated the low volume of paperwork necessary for participation in the program.
- One mentee commented that, with his mentor's help, he had changed his marketing message from an approach that positioned his product as a cool tool for you to use to one that solved a common business problem for his target clients. As a result, the results have been amazing. He says that MentorLinx is a phenomenal program with huge value to him.
- One mentee stated that, although he had found his conversations with his mentor helpful, he did not feel that the distance model worked well for his company which was well-established and planning to go public. He and his mentor have agreed to meet in person in January.

From regional innovation councils:

- One Executive Director said they would have preferred to be part of the Advisory Committee and have a say in how the project was developed and implemented.
- Some councils found it difficult to recruit mentees because the companies were not yet at the stage to be ready for a mentor, e.g. did not have a business plan, etc.
- One region had a local mentoring program that is meeting the needs of their companies so they did not need to refer many companies to outside mentors and this point although they felt they would in the future.
- Others found that they did not have time to do the recruitment.
- If additional staff time were available, they felt that they would use the program more.

6.5 Observations and Recommendations

6.5.1 Length of Match

Not all matches started at the same time, so some of them had not completed their three-month period by the end of the project on Nov. 30. Most are also planning to continue on after the three months are up.

Defining the initial match as a three-month commitment was beneficial when recruiting mentors and mentees. They were willing to participate because the time frame was manageable. However, there were a number of drawbacks to it:

- measurable results were limited to number of matches rather than growth in sales or other business growth statistics
- it takes longer to develop rapport and trust when not meeting face-to-face so the three-month period was insufficient to delve deeply into the mentee's business
- brainstorming is more challenging over the phone or by email so it took longer to get to a mutual understanding of the problem than it would have if meetings had been in person

The MentorLinx program was designed to allow matches to continue beyond the three-month period with the agreement of both parties. All but one of the matches is planning to do so. The mentee that is not planning to continue feels they need some time to implement the ideas they have already received.

Some mentors have indicated that a longer match period is necessary – they felt they were just beginning to understand the mentee's problem. Another alternative they suggested was to have the regional councils do more work with the prospective mentee in advance of assigning the mentor so that the problem was clearly defined and the two could then work directly on the problem. The challenge here is that the problem often changed after discussion with the mentor. An example was one mentee who asked for help writing a contract that would protect his intellectual property but it turned out that his real problem was nailing down potential sales so that a contract would be required.

It is recommended that regional councils increase staff time allocated to MentorLinx to help recruit and prepare mentees and mentors for the match and then monitor it. This should speed up the process of defining the goal clearly and make better use of the three-month match period.

6.5.2 Frequency of Contact Between Mentors and Mentees

Initially some mentors were concerned that the match would take up too much of their time and were a little hesitant about participating.

Subsequently, many of the mentors became enthusiastic about their mentees and the connections were much more frequent and flexible. They ranged from several matches where the mentors encouraged the mentees to call just about any time on any day to one match that was limited to exactly the two one hour calls agreed to.

Setting the expectation at two one-hour calls per month reassured the mentors and mentees that the program would not take up too much of their time.

Most matches found the experience interesting and valuable and quickly decided to increase their time commitment. Both groups reported receiving value from their interactions, but there was a greater degree of rapport and involvement in the matches that spent more time interacting.

No change to the time frame of three months is recommended, however, it should be left up to the mentor and mentee to increase the frequency by mutual agreement of they feel it is desirable.

6.5.3 On-line Registration

Registration and other forms necessary for mentors and mentees to participate in the program were initially provided on paper with completed copies being faxed or mailed to the program administrator. It became obvious that an on-line method of registration would be much easier for all.

As the BCRSTN website was in the process of being upgraded, forms and materials were placed on the consultant's website (www.dmateam.com) for ease of registration by mentors and mentees .

This process worked better and captured information in a useable form.

Continuation of web-based registration for mentors and mentees is recommended.

6.5.4 Referrals

During the project, there were a total of nine mentee referrals and three mentor referrals from the regional councils. Councils indicated that they had insufficient staff time available to recruit more mentors and mentees. They also said that some companies were reluctant to participate because the program was new.

It is recommended that additional staff time be allocated to promote the benefits of the program and to recruit mentors and mentees.

6.5.5 Mentor Recruitment

Forty potential mentors were approached. They had been suggested to us because they had a wide variety of experience with leading technology companies and had participated in other mentoring programs. Eighteen of them were available to participate during the program period. They were intrigued by the distance format and were interested in giving back to the sector and helping regional companies. Three of the mentors were recruited by the regional councils from their regions.

It is recommend that MentorLinx continue to recruit mentors through a referral process to ensure that they have a positive view of working with regional technology companies.

6.5.6 Mentor Connections

Mentors expressed a desire to get together with the other mentors to compare best practices and experiences. The Oct. 18, 2006 reception provided an opportunity for them to meet each other as well as the regional innovation council executive directors and other stakeholders.

It is recommended that the BCRSTN include a meeting with mentors as part of each BCRSTN general meeting in Vancouver – approximately 3 or 4 times per year.

7. ACT 2 – Access to Financing

7.1 Introduction

The second component of the ACTBC program addressed the difficulties faced by rural technology firms in accessing financing that would assist their firms to grow.

Two options for implementing this component were considered:

1. Create a new Access to Financing coaching program with separate objectives, mentors, processes, workbooks and materials.
2. Integrate the Access to Financing information into the existing MentorLinx model but ensure that mentees that identified access to financing as their critical issue are matched with mentors who have that expertise.

Our original, intended approach was the first option, however, it was felt that creating two separate programs with separate forms, lists and processes would be unnecessarily confusing.

The MentorLinx model was suitable for integrating Access to Financing into it. There was one area that needed to be enhanced – helping the prospective mentees to clearly understand three critical elements:

1. Their current stage of business development
2. The types of financing available and appropriate to each stage of development
3. Their business intentions

Consequently, three separate documents were created:

- *Getting Ready for Investors*
- *Synopsis of Steps to Growth Capital*
- *Financing Courses, Educational Materials and Advisory Contacts*

Getting Ready for Investors leads the reader through a discussion of the critical questions necessary to determine their stage of development, business intentions and types of financing potentially available at each stage.

The process would be that when mentee companies identify access to financing as the issue they wish to work on, before they are matched with a mentor, they will be asked to review the workbook and to complete the checklist at the back.

If they are still interested in obtaining capital, they will be encouraged to read the document *Synopsis: Steps to Growth Capital – Financing Technology Companies* which is a brief summary of the material on the www.strategis.gc.ca website. The summary directs them to the website for more detailed information if they need it.

If they feel they would like to take instruction on accessing financing, the document *Financing Courses, Educational Materials and Advisory Contacts* gives a number of options for increasing their knowledge. Although materials from a variety of jurisdictions in Canada and elsewhere were investigated, the majority of the listings are for British Columbia. Information is organized under the following categories:

- In-person seminars and courses
- Workshops available upon request
- On-line courses and educational materials
- Preparatory courses and materials
- Lists and directories
- Fee-for-service sources of expertise and connections

If they would like to explore potential government funding, the document *Funding Program Review* is available. This document provides summary information about:

- Science and Technology Research and Development programs

- Employment programs
- Economic/business development funding
- Venture Capital companies – a brief listing

Once they have reviewed the relevant materials and understood the options, if they wish they will be connected to a MentorLinx mentor who has indicated that access to financing is their area of expertise.

7.2 Stakeholder Review

To ensure that this revised approach would be acceptable to the stakeholders, review copies of the documents were circulated for comment to the following people:

- Bill McQuarrie, Executive Director, ISIC
- Roy Spooner, Executive Director, IRC
- Michael Kerr, NRC IRAP-ITA
- Gordon Bird, NRC (and the project team)
- Gerri Brightwell, IRAP Business Coach
- Project Team

Their reviews were positive. Their suggested changes have been incorporated into the documents.

The revised approach was then presented to the meeting of the BCRSTN members in Vancouver on October 18. The reception was positive.

Orientation to the materials was conducted by the consultants during two teleconferences, one on November 10 and one on November 14.

While the Access to Financing material was originally targeted mainly to technology companies seeking financing, feedback from the councils indicated that the documents would be useful to a much broader group of companies, and at an earlier stage of development. Several councils plan to publish the materials under their own logos on it and distribute it widely throughout their regions and to other organizations that assist small businesses.

7.3 Applying the Information

Based on the materials prepared for ACT 2, a regional council could offer a technology company client three options:

- The company could use the print materials provided and proceed on their own.
- The company could review the material provided and be matched with a mentor to help them examine their next steps.
- The company could choose to attend workshops or training to increase their knowledge of access to financing prior to proceeding.

The materials are provided as separate documents submitted with this final report.

7.4 Observations and Recommendations

The documents developed appear to fill a gap in materials available on Access to Financing.

It is recommended that regional councils make the documents widely available and monitor their effectiveness and usefulness.

8. ACT 3 – IdeaLinx: Fostering Industry, Academia, Government Networks

8.1 Introduction

The overall goal of the IdeaLinx networking segment of the ACT-BC project is to develop a model for industry-researcher-government interaction that would ultimately result in increased collaboration and innovation.

Existing industry-academic-government networks in various jurisdictions were investigated. The results are contained in the document, *IdeaLinx: Networking Model Review* (in Appendix G). Of particular interest were models that included a focus on cross-regional connections established and maintained virtually. Also of interest were those that exposed rural technology companies to new and leading-edge activities and researchers with whom they might not otherwise interact.

IdeaLinx also sought to help researchers in academic institutions become more aware of what is relevant in business, and expose them to new ideas, which ultimately could lead to innovation partnerships.

No examples were found that specifically identified including government representatives as a key part of their program goals.

A huge number of networks already exist. Virtually any association offers networking among its members, and many organizations identify networking as just one of several other activities undertaken. Therefore, rather than attempt to provide a comprehensive list of organizations and groups that provide networking opportunities, selected examples are provided to illustrate the kinds of existing networks that provide opportunities for academic-industry-government networking in science and technology fields.

A closer look was taken at the following and have provided additional information in the *Networking Model Review* (Appendix G).

8.1.1 Networking through organizations located at or stemming from academic institutions:

- London Technology Network
- University Industry Liaison Offices at UBC, UNBC, UVic, and SFU

8.1.2 Networking through community development agencies:

- Know-How Wales
- Innovation Resource Centre, Prince George

8.1.3 Networking through national science and technology centres and services :

- Centres of Excellence
- MITACS – Mathematics of Information Technology and Complex Systems
- NRC-IRAP – National Research Council's Industrial Research Assistance Program
- Anvar, France

8.1.4 Multi Country Networks:

- Faraday Partnerships, UK
- Eureka, Pan-European

8.1.5 General Networking Through Peer Mentoring Groups:

- Acetech
- CONNECT Denmark
- Women's Enterprise Centre's Peer Mentoring Groups

8.2 Networking Best Practices

This *IdeaLinx: Networking Model Review* document provides a small sample of the many networks contributing to business-academic collaborations. There are common themes regarding best practices that are leading to business-academic connections with great benefits, both economically and socially. While there are challenges, there are also many successful case studies that have resulted in innovative work and new technologies reaching the world's marketplace. All comments in the following section are based on personal interviews with people having direct experience with academic-business networking and collaboration. The sources are referenced in the document *IdeaLinx: Networking Model Review*

Networking events are the most common method cited by organizations for encouraging connections between academic and business people.

Important event elements noted by those interviewed are:

- Use a steering committee to identify topics, invitees and speakers.
- Ensure that topics are broad enough to attract more than a handful of attendees, and yet deep enough to be relevant for people with considerable business and research expertise.
- Keep the number of participants relatively small (e.g. 30-40 people) so that interaction and meaningful discussion can take place.
- Bring in prominent speakers from other areas.
- Hold events at easily accessible locales.
- Ensure that discussion (e.g. question-and-answer period, lively interaction) takes place rather than just monologue presentations.
- Arrange seating in a way that encourages discussion.
- Reduce opportunities for attendees to come and go.
- Do outcome follow-up.
- Do event evaluations and use these to fine-tune the workshops.
- Aim for a three-month planning period.

8.3 The IdeaLinx Model

The purpose of IdeaLinx is to assist regional technology company CEOs to connect with post-secondary researchers and with appropriate government staff to increase the level of understanding, interaction and cooperation resulting in increased innovation, collaboration and commercialization.

Based on the types of networking models reviewed and the best practices identified, the events model was selected as the one that would meet the needs of regional technology companies. Networking

events had been identified in the regional research as important to the companies' growth. Events could be implemented in all regions.

Incorporated into it are the relevant best practices and recommendations contained in the research. The Idealinx process consists of the following steps:

1. **Identification** of an industry sector to provide the focus for the event.

For the three pilot events described below, recommendations from the regional NRC-IRAP ITAs and other stakeholders were used to assist in identifying the appropriate focus for each event.
2. **Selection** of representatives of industry, academia and government relevant to that sector.
3. **Formation** of a steering committee to guide the process.
4. **Organization** of a face-to-face networking event structured to promote interaction both during the event and on an ongoing basis afterwards.
5. **Provision** of contact information for all participants to all participants at the event.
6. **Analysis** of feedback from participants following the event.

8.3.1 The Three Regional Events

Steering Committees:

- Kamloops and Prince George each had formal steering committees made up of representatives from the regional councils and the local post-secondary institutions.
- Although Castlegar did not constitute a formal steering committee, on-line consultation took place between the regional council, regional IRAP-ITAs and other stakeholders to determine appropriate industry sectors on which to focus.

Sectoral Focus:

- The original plan was to select one sector that would provide a clear focus for all regions. However, based on our consultations and on information collected by the regional ITAs during the previous year, three different sectors were identified and regions were invited to select the one that was most appropriate for their area:
 - energy – bio and alternative
 - nutraceuticals
 - geographical information systems

Identifying Event Locations:

- The BCRSTN members held a teleconference to discuss which three of the eight centres would host the Idealinx events. The locations they agreed upon were Prince George, Kamloops and Castlegar.
 - In each location, the steering committee identified topics, invitees and speakers. In Prince George and Kamloops, the committee met in person to discuss and plan. In Castlegar, the consultant acted as a liaison between the committee members who provided input by telephone and email.

Sectors Selected:

- Prince George – decided to include a range of technology sectors to see if a cross-sectoral approach would be effective.
- Kamloops – also decided on a cross-sectoral approach.
- Castlegar – focused on GIS.

Speakers to draw attendees:

The committees selected speakers, compiled the invitation list, and issued the invitations.

- In Prince George and Kamloops, the keynote speaker was a futurist, Ken Stratford from Victoria, who provided insights and information that were a good basis for small group discussions afterwards.
- In Castlegar, the government representative was the draw because there had been recent changes to the way information was being made accessible to companies by the government and attendees were very interested in knowing more about how it would affect them. Unfortunately, due to weather, his flight was cancelled. He provided his presentation to a colleague in the area who filled in for him.

Broad topics:

For each of the three events, the speakers' topics were broad enough to be of interest to a wide variety of attendees and stimulated spirited discussion.

Attendees:

- Each event was limited to forty participants and all reached that goal.

Lively interaction:

- In each location, the agenda allowed significant opportunities for interaction. The format was as follows:
 - Networking time
 - Presentations
 - Dinner and discussion

In Kamloops and Castlegar, attendees were encouraged to change tables for the after-dinner discussion time so that they could meet a greater number of the attendees.

Seating organized to encourage discussion:

- A seating plan was drawn up in advance to ensure that attendees were seated with a mix of industry, government and academic representatives.
- There were five to seven participants at each table to allow for everyone to be heard and to promote discussion.
- Each table had a designated person who was asked to ensure that discussion stayed focussed and everyone had a chance to be heard.

- Reduce opportunities for attendees to come and go.

In general, participants stayed for the full event. There were only one or two people in each location who had indicated in advance that they would have to leave early.

There was such good interaction and enthusiasm that there was no problem with people leaving early. In Kamloops, for example, although the event ended at 8 pm, a number of participants were still there at 9:15 pm engaged in spirited discussion.

- An evaluation form was provided in each location. A majority of attendees completed the forms and turned them in. The results are included in Appendix G. Feedback was very positive, with most attendees indicating that they would like to see additional events like this and that they would attend.
- Each participant received a list of attendees and their contact information at the beginning of the event. In addition, many collected business cards during the event to facilitate future contact.

Prince George has indicated that they intend to offer quarterly IdeaLinx events but will vary the focus for each event.

- One comment from participants in all three locations was that they found IdeaLinx very valuable because it was one of the few opportunities available to them to connect with the unique mix of people who were invited.

8.3.2 Observations

It was originally envisioned that the post-secondary researchers invited to the IdeaLinx events would come from outside the region where the event was held. It was anticipated that one or more of the three locations selected would not have local post-secondary researchers. As it turned out, all three locations did. There was a desire on the part of the hosting councils to promote interaction within the region first and save cross-regional interaction with researchers for a future event. Subsequently, although in each case there were one or more speakers from outside the region, the researchers were from the post-secondary institution within the region.

Participants indicated that events including industry and researchers were not common in their regions and they appreciated the opportunity to connect and would like further opportunities to do so.

Although the planning timeframe was very short for the IdeaLinx events, all three regions were able to offer an excellent event and met or exceeded attendance targets.

In Castlegar, one participant expressed an interest in having a similar event for the wildlife biology sector.

9. Recommendations and Conclusions

1. Expand the implementation of both MentorLinx and IdeaLinx in all regions.

The results of the pilots were positive. The companies that participated benefited from their interactions. The mentors found the experience rewarding. The representatives from industry, academia and government found the networking events valuable and there are initial reports of increased collaboration. The positive outcomes will encourage additional companies to participate in the program.

It is recommended that the MentorLinx and IdeaLinx programs be offered in all regions on a continuing basis.

2. Increase regional innovation council staff time available for MentorLinx to:

- **Recruit mentees and orient them to the program**
- **Recruit mentors and provide information on best practices for mentoring**
- **Monitor the matches**

The ACT-BC project was funded jointly by Western Economic Diversification and the BC Regional Science and Technology Network. Although there was some funding for administration, there was no funding for additional staff time in the individual councils. They have identified this lack of sufficient staff time as an inhibitor to wider implementation of MentorLinx and IdeaLinx.

It is recommended that the regional innovation councils approach both provincial and federal funding agencies for assistance in supporting MentorLinx.

3. Increase regional innovation council staff time available for IdeaLinx to:

- **Recruit participants**
- **Organize regular events**
- **Follow up and monitor resulting collaboration**

The IdeaLinx events helped to create connections between industry, academia, and government. These connections are important precursors to developing collaborative relationships. The regional innovation councils have identified lack of staff time and the cost of mounting the events as challenges with regard to offering these types of events on a regular basis.

It is recommended that a combination of funding avenues be explored for continuing these events including approaching provincial and federal funding agencies.

4. Investigate the need to establish an Aboriginal MentorLinx/IdeaLinx Coordinator's position to assist eligible aboriginal technology entrepreneurs.

Interviews with aboriginal stakeholders indicated support for the MentorLinx approach but identified modifications necessary for its successful implementation with aboriginal entrepreneurs. Specifically, there would be a need for a Coordinator to build relationships with the mentors to help them understand the unique needs of aboriginal entrepreneurs. The Coordinator would also need to build relationships with aboriginal agencies so that they would have confidence that when they referred their entrepreneurs to the program, the matches would be well-supported.

It is recommended that the need and support for an Aboriginal MentorLinx/IdeaLinx Coordinator be investigated with aboriginal stakeholders and, if indicated, the position be created and implemented.

5. Provide assistance to regional technology companies in identifying and applying for appropriate funding programs.

Companies identified access to financing as an obstacle to their growth. Although they perceived that they were looking for investors, many companies were not investor-ready. While they undertake the process of becoming investor-ready, there are a number of funding programs that could provide some financial help, however companies are often unaware of the programs or, if aware of them, they perceive the application and reporting processes to be onerous.

It is recommended that regional innovation councils make the funding programs information available to companies and provide assistance with the application processes, if necessary.

6. Offer information sessions on funding programs for companies, such as those offered in some regions for SR&ED tax credits, but including other funding programs as well.

In addition to the individual information and assistance recommended in #4 above, presentations on funding programs including who can apply, when, for how much, and then outlining the application and reporting processes could improve the participation of regional companies thereby helping them to grow.

It is recommended that presentations of this type be offered once or twice per year in each region.

7. Publish and distribute the MentorLinx materials on access to financing for use by other agencies with a wide range of companies.

Regional innovation councils stated that they felt that it would be beneficial to provide broad access to the materials prepared for this part of the project, particularly the document, *Getting Ready for Investors*.

It is recommended this material be made widely available in each region through the innovation councils.

8. Monitoring the Progress That is Made

The ACT-BC project period, May 16 to November 30, 2005, provided sufficient time to develop and pilot the processes, but insufficient time to see longer-term, measurable outcomes.

It is recommended that the regional innovation councils continue to monitor the MentorLinx and IdeaLinx pilot participants on a regular basis for one year to identify the ongoing benefits they are receiving from their participation.

Conclusion

The ACT-BC project was designed to address three key obstacles to success outlined in the PIC Report and corroborated by regional high technology studies done since 2003.

The success of the project indicates that continuation of the MentorLinx and IdeaLinx activities would be beneficial to the growth and development of regional technology companies.

Appendix A: Advisory Committee Members

- Dennis Bruchet, Western Economic Diversification Canada
- Laurel Douglas, Women's Enterprise Society of BC
- Brandon Hughes, Human Resources and Skills Development Canada
- John Lorenz, Industry Canada, Information & Communication Technologies Branch
- Lorne MacGregor, University of Northern British Columbia
- Diana Nacer, National Research Council of Canada
- Steve Perrault, Western Economic Diversification Canada
- Katherine Robinson, Nuu-chah-nulth Economic Development Corporation
- Garth Stiller, Western Economic Diversification Canada
- Linda Thorstad, Leading Edge BC
- Claudia Trudeau, BC Regional Science & Technology Network
- Tim Walzak, BC Innovation Council
- Felomena Wan, Western Economic Diversification

Appendix B: BCRSTN Members

The following members of the BCRSTN participated in the ACT-BC project:

- Advanced Technology Centre of Thompson Rivers University, Kamloops
- Innovation Resource Centre, North-Central Interior, Prince George
- Interior Science Innovation Council, South-Central Interior, Kamloops
- Kootenay Association for Science and Technology, West Kootenay and Boundary, Rossland
- Kootenay Rockies Innovation Council, East Kootenay, Cranbrook
- Mid Island Science, Technology & Innovation Council, Vancouver Island (except Victoria) and Sunshine Coast
- Northwest Science and Innovation Society, Northwest, Terrace
- Okanagan Science & Technology Council, Okanagan-Similkameen-Shuswap, Kelowna
- Science & Technology Association of the North, Peace Liard-Stikine, Fort. St. John

Appendix C: Funding Program Review

Appendix D: Research on Mentoring Programs

Appendix E: Access to Financing Documents

- Getting Ready for Investors
- Synopsis of Steps to Growth Capital
- Financing Courses, Educational Materials & Advisory Contacts

Appendix F: MentorLinx

- List of Mentors
- List of Mentees
- List of Matches
- Introductory Call Instructions
- Orientation Booklet with Forms and Pre-Referral Checklist

List of Mentors

<u>Status</u>	<u>First name</u>	<u>Last name</u>	<u>Company</u>	<u>City</u>
Mr.	Jack	Allison		Vancouver
Mr.	Noulan	Bowker	N. Bowker Inc.	N. Vancouver
Mr.	Greg	Bromley	T.L.D. Enterprises	Nanoose Bay
Mr.	Guy	Champagne	Marketplace Group Consultants Ltd.	Parksville
Mr.	Bill	Cooke	Consultant	Sidney
Mr.	Harold	Copping	TEC Canada (EX-Teleflex)	Vancouver
Dr.	Alan	Cornford	GPT Management Ltd.	W. Vancouver
Mr.	Barry	Dalziel	BDI Inc.	Surrey
Mr.	Gareth	Jones	Software Productivity Centre	Vancouver
Mr.	Terry	Knight	Terry Knight & Associates	Nanaimo
Ms.	Vida J.	Morkunas	Vida Morkunas and Associates	Vancouver
Mr.	Tom	O'Flaherty	Tom O'Flaherty & Associates	Duncan
Ms.	Cindy	Quigley	On Call Internet Services Ltd.	Kamloops
Mr.	Ted	Renner	Kiora Resources	Fernie
Mr.	John	Savage	Retired - Director IT - School District 74	Ashcroft
Mr.	Peter	van Bodegom	PricewaterhouseCoopers	Vancouver

List of Mentees

<u>Status</u>	<u>First Name</u>	<u>Last Name</u>	<u>Company Name</u>	<u>City</u>
Ms.	Kelly	Acheson	Adventure Engine	Rossland
Mr.	Salah	Eldeib	Altus Engineering	Vancouver
Mr.	Max	Fanderl	Book24-7.com	Invermere
Mr.	Garth	Frizzell	Terra Cognita Consulting	Prince George
Mr.	Craig	Harte	BuildIT Systems	Kelowna
Mr.	Lyle	Haugen	Regen	Fort St. John
Mr.	Alan	Reimer	Enviroscopics Services	Nanaimo
Mr.	Grant	Sutherland	Valhalla Consulting	Nelson
Mr.	Bart	Wagner	Refined Logic	Prince George

List of Matches

<u>Company Name</u>	<u>Mentor</u>
Adventure Engine	Barry Dalziel
Altus Engineering	Guy Champagne
Book24-7.com	Tom O'Flaherty
Terra Cognita Consulting	Noulan Bowker
BuildIT Systems	Vida Morkunas
Regen	No match
Enviroscopics Services	Terry Knight
Valhalla Consulting	Jack Allison
Refined Logic	Gareth Jones



MentorLinx: Introductory Call Instructions

1. Once you have agreement from the mentor and mentee to make the match, send them instructions for dialling in to the introductory call. Include the following information:

During the three-way introduction call on _____ (*date*), we will discuss the following:

1. Review the key points of the program, including:
 - confidentiality
 - reporting and monitoring requirements
 - is permission granted to list their names as a match on our website
 - when and how to end a match
2. Agree on contact parameters:
 - best day, time and numbers to call
 - set date(s) and time(s) for upcoming meetings
 - whether or not evening or weekend contacts are permitted
 - whether or not there will be email or phone contacts between scheduled meetings.
3. Clarify that the mentee initiates the regular mentoring calls.
4. Review the following perpetual agenda for regular calls:
 - Report on progress on action items from the last meeting
 - Identify how the mentor's information during the last call was helpful
 - Identify obstacles encountered
 - Ask for assistance and adjustments required
 - List action items to be accomplished before the next meeting
5. Discuss the issue to be worked on during the mentoring match:
 - identify the SMART goal you will be working on with the mentor
 - identify the success measures and milestones
 - List the type of help you are looking for from the mentor
6. Identify action items for the mentee to work on between now and the first regular meeting.

Appendix G: IdeaLinx

- Networking Model Review
- Event Feedback

Appendix H: Glossary of Acronyms

ACT-BC	Assisting the Commercialization of Technology in Rural BC
BCRSTN	BC Regional Science & Technology Network
CEO	Chief Executive Officer
HRSDC	Human Resources & Skills Development Canada
IP	Intellectual Property
IRAP	Industrial Research Assistance Program
ITA	Industrial Technology Advisor
NRC	National Research Council
PIC	Promoting Innovation and Commercialization in Rural BC
SR&ED	Scientific Research & Experimental Development (tax credits)
WD	Western Economic Diversification
WSI	Workplace Skills Initiative

Appendix I: Notes from Studies Reviewed

Seven studies published during 2003 and 2004 were reviewed to verify the needs of regional technology companies as they related to the ACT-BC Project.

Two of the studies were province-wide in scope:

- PIC: Promoting Innovation & Commercialization in Rural British Columbia, BC Regional Science and Technology Network, March 2003
- Ramp-Up! – Bringing Out the Best in British Columbia's Regional Economies, 2004

Five of the studies were focused on a specific region:

- Okanagan Technology Industry Study 2005, Okanagan Science & Technology Council
- The Okanagan Partnership – Okanagan Sustainable Prosperity Strategy – Final Report, 2004
- North Central BC Supply Side Analysis, March 2004
- 2004/05 North Central BC High Technology Study, Innovation Resource Centre
- Company Growth and Human Resource Survey of the Kamloops Region Advanced Technology Sector, Technology Kamloops, May 2003

Province-Wide Studies

1. The PIC Report: Promoting Innovation & Commercialization in Rural BC, March 2003

Recommendations made in this report were based on the findings after interviewing 263 regional businesses and 50 representatives of organizations of the S&T infrastructure of rural BC, holding 10 focus groups and reviewing over 120 documents relevant to rural BC - the area outside of the Greater Vancouver and Capital Regional Districts.

Recommendations included the following needs:

- To increase access to financing, with attention to financing for early stages of business development.
- For links to contacts and resources, which involve both networking and mentoring abilities.
- To improve the business environment for innovation by increasing access to best practices and training (mentoring and networking).
- For each region to have an accessible technology centre through which regional businesses can access technical, market and program information.
- To increase the number of Industrial Technology Advisors based in the regions, as well as the funding available under IRAP.
- For an on-line information panel for regional innovation companies.
- For investment-readiness programs in order to assist rural technology companies in approaching venture capitalists for funding.
- For enterprise forums to be staged in the regions, targeted at increasing access to angel investors.
- To stage workshops on using the federal and provincial tax credit programs.
- For government and industry groups to work together to promote awareness of industry capabilities within the regions of BC.
- To increase networking opportunities for regional companies including a virtual networking system for cluster companies located in isolated regional locations.
- For high tech business start-up programs to provide support through materials such as an Innovator's Kit, through mentoring, counselling, and training programs, and through business incubators.

- To increase the confidence of venture capitalists and financiers towards investing in the IT industry through an enhanced technical due diligence process.
- To build strategic alliances within the industry.
- To create networking opportunities within and between the sectors which provide a climate for collaboration and coordination, information sharing and identification of opportunities.

At the time of this study, it was noted that IRAP was the only significant source of funding that has a permanent physical presence in the regions. Community Futures Development Corporations were identified as a major contributor of loans as a source of business capital.

2. TELUS Ramp Up, 2004

Over 400 interviews were conducted with provincial, regional, private sector and industry officials and experts. In addition, prior economic development reports and a wide variety of economic and business data sources were reviewed.

Relevant needs and strategies as identified in the report are:

Wireless cluster:

- Facilitate improved collaboration with neighbouring wireless cluster in Seattle.
- Encourage increased private venture capital financing of wireless start-ups.
- Invest in wireless R&D through targeted research grants to universities.

Specialty semiconductor chips:

- Develop linkages between new specialty semiconductor industry and existing wireless, fuel cell clusters in Vancouver, for mutual support in technology, applications development.
- Consider alliance or partnership between PMC-Sierra and Firebird Technologies for wireless semiconductor design using GaAs or other compound semiconductors.
- Encourage existing collaboration between Firebird Technologies and Teck Cominco for material supply and technology transfer.
- Encourage growth of supporting industries in Trail and Vancouver to use, develop specialty semiconductor technologies and applications.

Biotechnology:

- Encourage the location into the region of a major pharmaceutical company that has a potential to become alliance partner, financing source, and management expertise provider to the BC biotech cluster.

B2B forest software:

- Consider alliances with logging and sawmill equipment manufacturers to ensure that software is integrated with forest industry equipment.

During the environment assessment it was identified that:

The enabling environment analysis identified a lack of collaboration among the regions, and between the private and public sector, a lack of financial resources and legal/regulatory hurdles to economic development.

And

Collaboration between the Lower Mainland and the Heartland needs to be improved.

Collaboration between the private and public sector must also be improved between the regions.

And

There is lack of availability of financing in the regions particularly for start-up and early stage equity financing.

Comments made regarding lack of collaboration:

- Inhibited by local governance models.
- High willingness but little action.
- Remoteness of geography a factor.
- Passive resistance is thriving.
- Inconsistency of regional definitions.

Regarding lack of financing:

- It's not just about capital, it's creating climates of risk taking and innovation.
- Limited equity financing under \$500k.
- Capacity to assess KBE risk is low.

A summary of feedback identified the following obstacles in climate for growth, which are not exclusive, but are relevant for our purposes:

- Lack of financing for emerging businesses.
- Weak business incubation and support.
- Need for formal angel investor networks.
- Need for non-traditional capital resources.
- Need to connect and collaborate to compete.

Region-Specific Studies

1. Okanagan Technology Industry Study 2005

Ranked importance of initiatives and programs to assist industry locally:

1. networking opportunities
2. industry events
3. mentoring and improved R&D linkages

Ranked importance of business development assistance:

1. developing business networks and contacts
2. need for technical development and training and marketing and finance.

Some programs exist for hiring and staffing, financing and business plans, but as companies grow, programs and support no longer fit their needs.

Development of mentoring program already in place. – OSTEC and Okanagan Partnership.

Venture capital success rate only at 50%.

Networking events received highest ranking of importance of the initiatives offered by agencies and associations in the Okanagan in support of the high technology sector.

Limited financing available for second stage companies – i.e. initial product development finished, moving into market development and growth stage creates issues for companies to fund inventories, receivables, and marketing and promotion for companies with long sales cycles.

Focus group input identified the following:

1. Limited business development skills in some companies – mentoring would be an asset.
2. Companies need:
 - more information about government programs
 - links for entrepreneurs to inventors
 - contact opportunities

Contained a recommendation to develop a mentoring program for emerging companies.

2. The Okanagan Partnership – Okanagan Sustainable Prosperity Strategy – Final Report, 2004

The report states:

- Areas that were pointed to were seed and venture capital, important to technology-based companies. Access to investment capital was seen as difficult in the region, and many qualified firms were forced to identify sources in Vancouver and Calgary.

The report also recognized that collaboration is key to a high performing region.

- Collaborate to Achieve Advantage: High performing regions around the world have achieved their status because their communities, businesses and institutions have built a collaborative culture. A collaborative culture is an environment in which all stakeholders are open to change and are willing to negotiate trade-offs and constructive agreements with one another – they get things done, often in creative ways. A collaborative regional culture enables businesses, governments and organizations to work together, to commit to new ways of doing business and to make investments that will have a mutually beneficial pay off. Learning and applying collaborative practices is the key to building the advantages that will help form and grow clusters and achieve a sustainable and prosperous economy.

Access to capital was one of the identified strategies (called flagships) required in this area:

- Flagship 6. Deal Generator: A catalytic initiative where the Partnership will support ongoing efforts in the region's communities to build the continuum of financial investment capacity from pre-seed to angel and venture capital funding to accelerate new enterprise formation.

One method for dealing with this is:

- Facilitate access to financing for start-up and growth companies, certain industries, and First Nations by improving knowledge of the region and its industries among lenders/investors, and linking entrepreneurs to lenders/investors/funding agencies.

Steps to achieve this:

- Enlist support of Chambers of Commerce and other regional groups to lobby the Provincial Government to increase the Venture Capital Corp tax incentives available for businesses outside of Victoria and the Lower Mainland to facilitate investments in this region.
- Work with UBC-O and its affiliates in the development of its programs and research (esp. economic) and development capabilities.
- Develop database of lenders/investors and general criteria for financing at various stages of business and industries.

- Determine and secure regional home for database.
- Facilitate education of lenders/investors to learn about certain industries.
- Facilitate education of investors and companies outside of this region on the investment and business opportunities in the Okanagan.
- Work with local and provincial levels of government to provide incentives and marketing resources to attract capital and business to the Okanagan.
- Develop a marketing plan to promote the investment opportunities in the Okanagan.
- Educate entrepreneurs/business owners on how to seek financing by providing inventory of community resources, tick list of criteria to take care of (e.g., patents, incorporation, etc) to better prepare themselves for a financing approach.
- Publicize the Okanagan Angel Network, which allows business owners to seek angel investment. Angels can review anonymously and contact entrepreneurs if they are interested.

Mentoring (also under finance section):

- Establish a business advisory program where entrepreneurs can virtually access experts in the region for confidential mentoring and advice.

3. North Central BC Supply Side Analysis, March 2004

Constraints inhibiting expansion included:

- Financial constraints:
 - o start-up/expansion capital, cash flow, debt avoidance, operating costs.
 - o travel and transportation costs.
 - o insurance

Lack of mentorship was also identified while performing this survey analysis. Points made regarding mentorship included:

- In rural areas such as NCBC, distance can be a major barrier to mentorship. At times the mentor must travel for hours to meet face-to-face with the CEO.
-A seasoned mentor could help in identifying the key qualities required for a given job and in assessing prospective employees.

Recommendations on how to correct the mentorship unavailability include:

- Encourage the formation of presidents' clubs so they can be used as a forum for seminars on the subject.
- Identify former NCBC residents employed in senior positions elsewhere and invite them to participate in such seminars.
- Provide financial assistance to a few NCBC presidents or senior managers to visit companies in the Lower Mainland. During such visits they would become exposed to the day-to-day management problems encountered by the senior managers of those companies.
- Identify reading materials on the subject (perhaps develop a local handbook on the subject).
- Provide financial assistance for a day-long mentoring conference that would be an extension of the seminar program mentioned above. Speakers could be senior managers from a variety of difference companies, with an emphasis on attracting former NCBC residents.
- Provide funding for companies to hire (in a mentorship role) retired executives living in the NCBC region.

4. 2004/05 North Central BC High Technology Study

- Access to capital – identified as major obstacle to growth, due to lack of financing available, denial because of start-up stage, difficulty in valuing intangible software assets.

- Networking/Mentoring - Industry contacts and connections identified as number one obstacle to business development.

5. **Company Growth and Human Resource Survey of the Kamloops Regions' Advanced Technology Sector**

Survey conducted in Kamloops Thompson/Shuswap region to assess any challenges or barriers to growth faced by technology and manufacturing companies.

Access to Capital:

- Major barriers or challenges to growth identified by local companies are typical of early stage technology companies. They need financing for their growth followed by marketing and sales assistance. HR issues are important but less of a barrier to growth.
- Access to three types of financing (conventional, seed capital under \$100k and venture capital over \$100k), were rated as extremely high barriers to growth by 1/3 to 1/2 of the companies. (175 companies total). The 3 financing questions received more 6s and 7s on expected difficulty than any other questions on a scale of 1 to 7 (very low to extremely high).
- Specialized private sector service providers and investors play a key role in the growth of the exporting companies that create much of the new economic wealth and spin-off jobs in an advanced technology economy.
- Growing technology companies have an above average need to access specialized private sector service providers and investors. Becoming investor-ready for rounds of financing and export-ready for the sales growth that equity investors demand are major and difficult milestones to achieve.
- There are many gaps locally in the specialized private sector service providers needed by growing technology companies striving to achieve their milestones such as becoming investor-ready or export-ready, launching a product in the U.S., connecting with angel investors, getting ready for VC due diligence, etc.

Mentoring:

- The companies needing specialist advice to grow are usually past the survival stage and have a CEO wanting to grow the business. Companies with growth potential have validated a market opportunity and have finished developing a product and/or service that solves a problem in the market.
- First time technology entrepreneurs receive benefit from the same generalist advice, training and coaching offered to first time entrepreneurs in non-technology start-ups and micro-businesses. Once these new companies grow beyond the early survival years and have positive cash flow, some will identify technology business opportunities with the potential to be incubated into a business opportunity.
- Finding employees with experience is a barrier, same with ongoing training and development – could be helped by mentoring.

Networking:

- A very large network of specialized private sector service providers is needed by an advanced technology economy. CEOs in a region like Thompson/Shuswap with big gaps in specialized, private sector, service providers would certainly benefit from a linking service to out-of-town specialists.

Summary of Recommendations:

- provide an Access to Capital program to improve access to existing sources of risk capital. It would assist companies to deal with the critical challenge of financing their growth.
- access to capital, particularly early stage capital, has long been recognized as a major barrier to the growth of technology and manufacturing companies by various levels of government.
- for many technology executives, especially first time entrants or seed round and early stage companies, raising equity capital is the toughest challenge in today's economic environment. Can be single most determining factor as to whether a company succeeds or not.
- An access to capital program is much more than an introduction service. An Access to Capital program needs to bridge a significant gap between technology-based business opportunities and investor-ready companies. The real problem is a shortage of investor-ready deals.
- Companies need advice and mentoring on how to become investor-ready and create an effective fundraising campaign. They often don't know how to build the missing ingredients of their business and consequently reduce their risk and the risk for their potential investors. This program requires a manager able to assess the needs of a growing company, give diverse first line business advice and make intros to a broad, cultivated network of financial intermediaries, angel investors, brokers, merchant bankers, institutional investors, securities lawyers, etc. The mgr needs to be credible with entrepreneurs and with those in the financial community who are often very specific in the types of deals they want to see.
- Develop a community-based venture capital fund – go hand-in-hand with access to capital program.
- Develop business growth catalyst service to provide resources needed to grow business – i.e., leverage on the valuable activities and skills of volunteer groups, publicly funded service organizations and private sector service providers. It would intro qualified prospective clients to service providers and direct CEOs in the right direction to individuals with the expertise they need to grow their business.

Appendix J: Aboriginal Consultation Notes

Ray Gerow, President and CEO
Aboriginal Business Development Association
Prince George, BC

September 29, 2005

After an explanation of the ACT-BC project, its origins and objectives, Ray offered a number of comments, suggestions and recommendations:

- While the total numbers may not be huge, Ray knows of two or three aboriginal-owned companies that have developed innovations and inventions, and who may want to grow their companies by commercializing their technology. Extrapolating from this local knowledge, he believes there is a need for MentorLinx in the aboriginal community.
- Currently, the challenge for many aboriginal business service providers is that they deal with a very limited number of technologically-based aboriginal companies and therefore find it very difficult to keep their expertise current in terms of supports, services and programs. His standard response is to send them off to the IRAP program (not really knowing if this is appropriate for either party).
- With reference to the MentorLinx matching process, Ray's immediate comment was that even with a three-way telephone introduction for the first contact, aboriginal clients would not feel comfortable enough to continue the mentoring relationship.
- For aboriginal clients there is quite a trust-building process before they feel comfortable with their business advisor in the aboriginal business service agency. While the trust is very slow to develop it is quickly destroyed.
 - Ray's comment is that he will not refer clients to the Canadian Executive Service Overseas (CESO) because the quality of the mentors has been quite uneven, and it damages his credibility with his clients
 - He believes that most aboriginal business counsellors have the same protective attitude of their clients and their own reputation
 - The 'chemistry' required in a mentorship relationship is even more important in an aboriginal mentorship relationship
- The conclusion he drew was that there needed to be a mechanism that would allow both the mentee and the aboriginal business service provider to build a trust and confidence in the quality of the mentoring matches
- He felt that if meeting the needs of aboriginal entrepreneurs was a serious goal, consideration should be given to developing an Aboriginal Component to the program that would provide an aboriginal MentorLinx coordinator who would semi-regularly visit the aboriginal service providers to explain the program, build a trusting relationship with the service providers, and make the matches and administer the program. The service provider would then be comfortable to recommend MentorLinx to their clients.
- Ray felt that WD would be very open to funding such a program.
 - This component could be integrated with a BCRSTN MentorLinx function

- The MentorLinx (Aboriginal) coordinator role could, in addition to making the matches and administering MentorLinx, provide key information about specific aboriginal funding programs and the federal government's Aboriginal Procurement program
- The best place to meet aboriginal business service providers, economic development officers and some Chiefs and Councillors that have economic development responsibilities is at the Strategic Conversations Conference held each November in Vancouver. The ABDA organizes this conference and Ray suggested it would be possible to be put on the agenda. This year's event is November 23 & 24, 2005.

**Art Mercer, Economic Development Officer
Nisga'a Lisims Government**

Several messages were exchanged and a two page overview of the MentorLinx: Business Mentoring program was forwarded for his review. A brief telephone conversation elicited the following:

- Art was very concerned that many consultants/mentors were too directing. They did not work with the client long enough through a series of incremental changes until the desired result was attained.
- He had not seen too many consultant/mentor relationships where there was a true transfer of capacity.
- He thought it was key to recognize that individuals learn in different ways, and that recognition needed to be built into the program.
- CESO was hit or miss. On occasion they provide a really valuable service if they pause long enough to determine what the real issues are. Too often Art felt that they jumped to the conclusion they wanted and proceeded on that basis.
- After examining Telus' plans for telecommunications services to the Northwest the Nisga'a determined that they needed to be involved in service delivery if for no other reason that they would not be able to run their own government operations on the bandwidth proposed by Telus. As a result, the Nisga'a Lisims government has established NTel which is a non-dominant carrier registered with the CRTC. They now are expanding into other telecommunications niches in the area.
- CESO could provide really valuable services.

**Kevin Schindelka
National Aboriginal Capital Association**

- Kevin stressed the importance of personal relationships and especially developing trust within the relationship.
- His recommendation was that the agency referring clients to mentors would need to know the mentors or at least have interviewed them.
- He felt for the program to be successful in the Aboriginal world there would need to be extensive contacts with the key Aboriginal business support agencies.

**Katherine Robinson
Nuu Chal Nuth Tribal Council**

Several conversations were held with Katherine who offered the following insights:

- She agreed that Aboriginal business service providers would be unwilling to refer clients to mentors unless they were familiar with them.
- It has been her experience that Aboriginals need to be really comfortable with people who are there to help - they need to make sure that they are not there for a cause.
- There needs to be a focus on business success.
- She liked the idea of a one-half time Aboriginal coordinator for the program to ensure that Aboriginal service providers and the Aboriginal mentees understood the program, how it worked and the value that it could bring to their success.

**Gerri Collins, General Manager
Central Interior First Nations CFDC**

An initial telephone contact was made and the overview of the MentorLinx program was forwarded to Gerri. She did not offer any comments on the program.

Appendix J: Program Comments and Suggestions From Mentors and Mentees

Mentors and Mentees were asked to comment on what had worked well in the MentorLinx pilot and to make suggestions for improving the program. Their comments follow.

I. Mentor Comments

Jack Allison

- He agreed to be a mentor for two reasons:
 - o It is in his life plan to give back
 - o He would like to expand his network
- In his past mentoring experience he has found that many CEOs are still struggling with the basics.
- The match is going well. The challenge is to keep the focus.
- Suggestions for improvement to the program:
 - o Develop benchmarks for the mentors so that they know what the standards are and where they should be with their mentee at specific points in time, e.g. after 3 meetings.
- A generic sharing opportunity with the overall group.
- Circulated share experiences.

Noulan Bowker

- He believes that many regional CEOs are making big decisions on far too little information.
- This program is one way to help them avoid that.
- The program sets up expectations at the beginning, which is good.
- They haven't followed our structure for the meetings, but are developing their own process.
- It has been a for sure good experience.
- The match happened without a lot of process and was quick and transparent from the mentor's point of view.
- Would be willing to take one more mentee if needed.
- Suggestions for improvement:
 - o A face-to-face meeting would be very valuable – if money could be made available to cover the expenses, he would be willing to spend the time to go. Should take place after the first month so that the two participants can qualify each other before spending the money. Would be very valuable to meet the rest of the management team and some of the clients

Guy Champagne

- Has met with his mentee once over the phone so far.
- He feels he will be able to help him.
- Their next meeting will be face-to-face in Vancouver.

Barry Dalziel

- It is a fun activity and something he looks forward to.
- The match is going well, they talked weekly for the first 3 weeks and now every 2 weeks.
- He has enjoyed the mentee's enthusiasm.
- It is more difficult when meeting only on the phone
- Suggestions for improvement:
 - o At least occasional face-to-face meetings
 - o Administrative aspects of the program from his perspective are fine

- Having multiple mentor input (as with the BAB) would be good
- Ensure that mentees meet the eligibility criteria

Gareth Jones

- The match started out well and he will be happy to keep going
- Enjoyed meeting the regional people at the reception on Oct. 18.
- Has offered to assist if there was anything else he could do to ensure the continuation of the program.
- Suggestions for improvement:
 - Biggest challenge is to get a picture of what people want – the personal contact for clarifying the problem is helpful, but perhaps the sharing of white boards and desktops might help or webcams. Missing the knowledge of the person when only meeting on the phone.
 - One face-to-face meeting every 6 months

Terry Knight

- There is no end to the need for mentoring.
- The personal connection is good.
- The match is going well.

Vida Morkunas

- Comments on mentoring in general:
 - The relative sophistication of the CEO affects the outcomes obtained.
- Her match is going well.
- On the program:
 - It is a beneficial program for all involved but it could use some improvement.
 - Create a definition of best practices for mentorship/coaching – share these with the mentor. We each have our individual styles for coaching – I am curious to learn from others how they coach, how they work with their mentees.
 - It would be useful to determine ahead of time what the needs are of each mentee and to work within a structure that best addresses the needs of the mentee, while leveraging the skills of the mentor.
 - A three-month pilot is just a warm-up; the process needs to be longer in order for the mentee to derive benefits.
 - It would have been beneficial to have a summary of my mentee's main issues prior to the beginning of the mentoring relationship. I feel we spent too much time establishing what the priorities were prior to getting to work on the issues.
 - It takes 2 to 4 hours to ramp up in month 1 and after that 1 ½ hours per month with a 3 to 6 month commitment would be adequate.

Tom O'Flaherty

- Comments on mentoring in general:
 - It is very much a two way street.
 - CEOs are not always open to advice.
 - In his experience there are several motivations for wanting a mentor:
 - As window dressing because it will look good if he has this particular mentor
 - The CEO who wants the mentor to tell him he is doing everything right
 - The CEO who wants to debate but is not really open to change
 - The small group that are actually open to advice and want to grow
 - Mentoring involves a fair amount of work on the part of the mentee to keep the mentor up-to-date on what's happening in the company. Being willing to just call up and give an update.
 - Some of the best mentees will identify issues.
 - Although he would like to see a business plan from the mentee, the most important point is for them to know where they are currently at and where they want to go.
- He found that the match worked well with his mentee because he was very focused.

- On the program:
 - o He found that the program was well set up and the introduction worked well.
 - o The paperwork and reporting have not been burdensome.
 - o He mentioned the importance of having the mentees focused on an issue or goal before being matched with a mentor.
 - o He would be willing to take on another mentee in 2006.

II. Mentee Comments

Kelly Acheson

- The match is going quite well.
- We spend one hour every two weeks meeting by phone.
- He has given her excellent input, e.g. the difference between features and benefits.
- The dialog with an outsider is so refreshing.
- It has been a great experience.
- Feedback on the program:
 - o Liked the low amount of paperwork
 - o MentorLinx fills a need for her
 - o Likes the flexible format for the calls and that she leads the discussion
 - o She would do it again for sure.
- She has not asked her mentor to continue after the three months are over because she feels she needs time to go back and fill in the areas that they identified as gaps.

Salah Eldeib

- He has been busy and has found it difficult to make time to meet with his mentor.
- Their next meeting will be face-to-face, likely in Vancouver
- Suggestions for improvement:
 - o For a company at their stage of development, face-to-face meetings would be more useful.

Max Fanderl

- It's a phenomenal program.
- Has provided huge value to him.
- Appreciates the sounding board which gives him the confidence to go further.
- He stressed that it is important for mentees to do their own work and to be prepared to work with the mentor. He is concerned that the mentors may get bored with kindergarten questions.
- Suggested improvements:
 - o Would like an opportunity to meet with a panel of mentors for 2 or 3 hours – this could be even more powerful!

Garth Frizzell

- Very happy with his mentor – perfect match.
- The introductory call was useful and identified tools they could use.
- Meetings are regular enough for his needs.
- Has been encouraged to call any time, including weekends.
- Did not feel that he would like to use a webcam – would feel less private.
- Plans to continue on with the match after the initial three-month period is over.
- Suggestions for improvement:
 - o Biggest drawback is finding common times to meet by phone.
 - o 3 months is a good timeframe.
 - o Has met his mentor once in person and felt it was very important.
 - o Blog or forum for share insights.

Craig Harte

- Has had two calls with his mentor. Used the time mainly to get up to speed.
- It is the right fit.
- He participated in a panel mentoring situation two years ago but didn't find it very helpful because the meetings were all in Vancouver and he couldn't always go.
- Suggestions for improving the program:
 - o Needs to be a longer time frame.
 - o MentorLinx is good. In a different mentoring situation that lasted a year, he found himself perpetually overwhelmed because they met for ½ day every week and he dreaded having 500 more things to do after each meeting.

Alan Reimer

- Match going really well.
- The accountability to the mentor is helpful.
- MentorLinx served as a way of introducing him to his mentor, whom he would have chosen himself given the opportunity, but he felt that the person was likely too busy so he never asked.
- Received good suggestions from mentor.
- No specific suggestion improvements. All MentorLinx can do is to be available and to reassure companies that it is painless. There are always some costs and companies are suspicious of free things.

Grant Sutherland

- The match is going well.
- On the advice of his mentor, he attended AceTech and had dinner with his mentor and two other colleagues. It was a great opportunity to discuss what he had learned at Acetech and to find out more about how one person had built up and sold his software company.

Bart Wagner

- Good match with his mentor.
- Appreciates the external help to set goals, dates and action plans.
- Better help from this program than from the MicroSoft ISV mentoring program he signed up for last year.
- Was encouraged to call his mentor as often as needed. Mentor even gave him his cell number when he went on a trip to England.
- Used Skype.
- Advice from his mentor saved him a great deal of stress
- Suggestions for improvement:
 - o Have automated sign-up forms on website
 - o Embrace the use of Skype and NetMeeting as tools for the matches