Mentoring–A Practical Guide

Process Models – Ground Rules – Techniques

Recruitment – Matching – Monitoring – Evaluation

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1   Introduction and Definitions

This mentoring guide is divided into two parts. Part 1 offers insights to our understanding and approach to mentoring, processes and techniques we find useful (section 1 – section 4). Part 2 of this guide is aimed at mentoring programme managers. In this part we would like to share some insights around, recruitment, selection, matching, monitoring and evaluation of a mentoring programme (section 5 – section 9).

The Young Entrepreneurs Succeed (YES) projected supported over 600 young unemployed not in education or training (NEET) through mentoring to set up their own business or to secure a job between 2018 and 2023. During this period, the implementation and delivery of mentoring services was affected by unprecedented challenges such as the COVID-19 pandemic, the cost of living crisis, the outbreak of war in Ukraine or the devastating floods in Thessaly. These challenges have changed and challenged our understanding and approach to mentoring. This guide aims to share insights on how the implementing partners of the YES project have responded to these challenges.

Quite often we are asked what mentoring is and how it is different from other helping interventions, such as coaching for example. The answer depends on whose book you read. There are many different definitions and, more importantly, different social practices in different social contexts out there which define and shape mentoring. In this guide we focus on mentoring for young people between the age of 20 and 30 who are not in employment, not in education or training (NEETs). We will discuss mainly three different forms of mentoring, i.e. support mentees to either start and sustain their own business, to support micro entrepreneurs to face challenges of a crisis, or to secure a job. Additionally, we will discuss how our approach to mentoring has developed during the COVID-19 pandemic. This guide is based on our practical experience as mentoring programme managers (MPM) and mentors as well as research. At the end of this guide, you will find a list of books and articles related to mentoring which .

Mentoring has changed over time and, more importantly, is subject to change according to (social) context. Rather than offering a definition we would suggest to look at functions of mentoring. Bob Garvey suggests to understand mentoring as a learning relationship between two (or more) people. It requires trust, commitment and emotional engagement. It involves listening, questioning, challenge and support. It has a time scale. Mentoring, therefore, is linked to a learning and development agenda which happens between two (or more) people in a social context in which it takes place. Understanding this social context is highly relevant and we will come back to it throughout this guide. We suggest to understand mentoring as a social practice which aims to

support the mentee and their agenda through a reflective process. A reflective process encourages the mentee to find solutions and ways of being and doing rather than telling them what to do. Reflective processes require listening and asking questions. In comparison to other helping interventions, mentoring is always a voluntary service!

Sometimes the origins of mentoring are tracked back to Homer's character Mentor, who was asked by Odysseus to educate and take care of his son, Telemachus. At some point, the goddess of war, Athena, took over the Mentor's role as she was not happy with Telemachus' education. This narrative of the origins of mentoring raises some interesting questions. Firstly, who set the agenda for Telemachus' learning and development journey? Secondly, in what social context did mentoring occur? And last but not least, does this narrative of mentoring hold value for today's challenges? As a response to the first question, it appears that the mentee had little to no influence over the agenda. Someone else decided what the mentee should learn and he should behave. Unfortunately, we still find this attitude in modern coaching and mentoring programmes. The agenda is concerned with organisational fit, performance, and skills. The mentee, or the learner, has little influence on the agenda. Such a power imbalance can create a wide range of issues, which could potentially damage the relationship between mentor and mentee and thereby negatively impact the outcomes of the intervention. In response to the second question, it seems important to understand that the mentor was a product of a patricidal society in which women were considered little more than chattel. Social mobility was determined by class and privilege, not by merit. We would argue that in today's society background and privilege are often a determining factor when it comes to job opportunities as well as social and economic integration. However, if we want to draw some learning from Homer's narrative, we could read it as a warning. Telemachus' journey ended in a blood bath and destruction, an outcome we would not want in a modern, democratic society. Thirdly, Homer's narrative offers a good read and insight into human nature, it raises ethical questions when we compare it to today's world. What we may take away from Homer's narrative is that a learning agenda can be influenced and shaped by social context. Garvey and Williams posit learning is a social activity. We would argue that a Duty or Ethics of Care, which acknowledges that at some point in our lives we depend on others and the relations of helping and supporting each other is relevant for the development of any community. To conclude, Homer's narrative offers little help in understanding today's approaches to mentoring. However, it raises questions of power and control as well as ethical questions which are worth exploring in more detail. It can also serve as an example that mentoring needs to be adjusted to social contexts. We will discuss this in more detail as we introduce the different forms of mentoring later on in this manual.

1.1   Our approach to mentoring

Autoocupació has set up mentoring programmes locally to support underserved communities during a phase of transition, mostly to support entrepreneurs during the first three years after launching their businesses. Mentors are matched with their mentees when entrepreneurs actually start their business, in more broader terms, after they have registered their business during the post-start-up phase. The ambition is to provide much need additional support during the critical first three years of business operation. Similarly, young people (re-) engaging with the labour market are matched when they have completed training and coaching interventions which aim at improving job search strategies, drafting covering letters and CVs. Even though mentoring for entrepreneurs and for engaging with the labour market can differ, the underlying process and techniques are similar. Additionally, mentees are matched with a mentor when they are actually doing it. That means, when they actively engage in entrepreneurial activities or actively are looking for employment opportunities.

1.2   Mentoring for entrepreneurs

Autoocupació's approach to mentoring for entrepreneurs has been influenced by Youth Business International (YBI). YBI supports entrepreneurship support organizations in over 50 countries across the globe. A core service has been to support the design and implementation of mentoring programmes. Business owners, senior consultants and managers from the corporate world have been selected and prepared to become mentors. The selection, matching and evaluation process has been supported by a mentoring coordinator. Mentors and mentees participate in an induction training which is designed to familiarise them with the objectives of the programme as well as share processes and related techniques which can be useful to support the agenda of the mentees.

At Autoocupació, we promote non-directive mentoring, where the mentee set's the agenda, and mentors encourage their mentees to reflect on what is happening on their life, their decisions and actions they want to take. We recognize that there is no one size fits all approach to mentoring. However, we encourage mentors and mentees to invest time into building trust and rapport which creates a non-judgmental space where mentees are encourage and enable to think it through on their own, arrive at their own conclusions and actions they want to take. Mentors can share their experience with the explicit permission of the mentee. They challenge and support their mentees by asking questions rather than telling them what to do or to think. This approach can be challenging for mentors. Especially in situation where it is easier to tell the mentees where to go and what to do. But at the end of the day, the overall outcome of a mentoring journey is the help mentees to stand

on their own two feet. This requires listening and asking questions and not following someone else's agenda. Such agendas can be found in competency frameworks which set out learning objectives for different topics. Whilst such competency frameworks are popular and can be found regularly in publicly funded programmes, we strongly encourage not to use them in mentoring programmes. The main reason is that such frameworks can dominate the learning agenda and interfere with the ambitions of the mentees. Furthermore, such frameworks tend to ignore highly relevant issues such as issues of belonging, identity, social context and social practices. We suggest to understand such issues as existential and highly relevant for the mentee. The value of mentoring can be attributed to volunteering, the rejection of trying to fix something and to trust in mentees. Over the last decade, we learned that mentees value most that some stranger showed up to support them, someone who believed in them, who trusted them, who abstained from judgement. Mentoring as a social practice aims to create a container of psychosocial safety which enables critical thinking, reflection and taking action. Bob Garvey introduced the old English verb "to coddiwomple" which translates to go purposefully to a vague, unknown destination, to the coaching and mentoring discourse. In our context, to coddiwomple could be interpreted as mentor and mentee walking side by side to overcome obstacles and find a path along the journey of the mentee.

We would suggest to understand mentoring for entrepreneurs as a social practice where the mentees can learn and develop. The agenda is often influenced by challenges the entrepreneurs actually face. Such an approach to mentoring benefits significantly from using reflective processes based on the actual experience of the mentees.

1.3   Mentoring during the COVID-19 pandemic

Autoocupació has favoured and promoted in-person, 1-on-1 mentoring. The COVID-19 pandemic hit the (mentoring) world unprepared and affected countless small businesses. As a response Autoocupació developed a learning series for mentors and mentoring coordinators to help them to

- Make use of technology such as Zoom, Skype, WhatsApp, Google Meet
- Develop a better understanding of the situation,
- Develop a better understanding of change, dealing with volatile situations, uncertainty, ambiguity by building a working alliance with others,
- Make use of experience from other mentors by creating peer-learning opportunities.

In a mentoring way, practitioners and researches tried to address challenges. One of the main issues was the transition from in-person meetings towards online meetings. Mentors and mentees

had to come to terms with a new reality, where no one could predict when lockdowns would end and how the pandemic would affect the world.

The difference between mentoring nascent entrepreneurs and small business owners, including self-employed, facing volatility, uncertainty, complexity and ambiguity created by the COVID-19 pandemic is quite pronounced. There is evidence that financial distress has an impact on well-being and self-employed experience more negative effects related to well-being, overall health and life satisfaction than the wage-employed. The subjective well-being (SWB) deteriorated during the pandemic and probably broke the self-employed's resilience. Hence, a system of social support for affected groups needs to be provided.

A difference between mentoring for self-employed before and during the COVID-19 pandemic can be found in the SWB. Making the transition towards self-employment, either out of unemployment or out of wage employment, can be considered as a pro-active choice, triggered by the mentee whereas dealing with the effects of the pandemic can be considered to be reacting to a situation triggered by an event or external factors which requires change. Making the transition towards self-employment pre-pandemic has a rather positive effect on the SWB and can be associated with the presence of hope, which has been identified as a key factor in terms of external factors impacting the effectiveness of support. The need for change driven by external factors also created a feeling of losing control which directly impacted the well-being and the performance. It became clear that mentors –if they want to be helpful– need to be able to address mental and physical well-being. Additionally, mentors need to have a basic understanding of managing change and understand the effects of change triggered by external events.

The element of uncertainty and ambiguity is also relevant in this context. Business economic tools which are designed to control and predict the future, such as business plans, working with goals and milestones have been of limited use. While a business plan offers a good insight into the level of preparation and thinking a nascent entrepreneur has invested in developing a sustainable business model, such plans can become too static to address changes in the market or customer behaviour which is essential for the survival of small businesses. We suggest understanding business plans do not work in start-ups and could be toxic, mainly because start-ups are not smaller versions of larger companies. Entrepreneurs have to test their solutions and products and a significant part of developing a sustainable business model is being able to attract customers so that the business model becomes repeatable, scalable and profitable. The Business Model Canvas allows for experimentation and pivoting ideas to create a market fit. Such flexibility and

encouragement to experiment is hardly possible when using business plans. There was a need to pivot business models quickly and respond to the pandemic effectively. We suggest a discovery-driven approach to reduce risks and to seize opportunities.

However, it is essential to create a space in which the mentee can develop, explore and experiment with new ideas. Some practitioners and researchers encourage mentors (and coaches) to build their own library of techniques, making use of existing techniques and add their own as the context and situation requires. The risk of such an approach is that techniques can dominate the mentoring process. Techniques should be used with the explicit agreement of mentees only and as a way to find answers to open questions. There seems to be an interest from mentors to learn new techniques. The reasons could be rooted in dealing with challenging situations or in feeling of not knowing enough to address all questions mentees might ask. If there is one take-away from mentoring during the pandemic, it is that as mentors we do not have to have all the answers. More often it is helpful to admit that and invite the mentee to find answers and solutions together through conversations which can involve others and through experimentation.

While it is debatable whether drafting busines plans is actually helpful or not, mentors should be familiar with different processes and techniques which help the mentee to explore new or alternative business models to ensure business survival. Quite a relevant objection is related to the mentee's agenda. Business planning develops its own dynamic and the process' focus can easily shift towards the business plan itself rather than focusing on the mentee's agenda.

Especially during the beginning of the pandemic early 2020, when businesses were forced to close and existing business models did not work anymore, mentors and mentees have been looking for processes and techniques which allow for adjusting existing business models to a new realty and allow for experimentation. This includes letting go of the old and develop an openness for the new.

In order to make sense and to work for mentees any process models and related techniques therefore need to enable the mentee:
- To deal with the stress and negative emotions, i.e. social distancing, uncertainty, fear of losing control, financial worries,
- Allow for creativity and experimentation,
- Put the mentee's agenda at the forefront of everything,
- Create an atmosphere of psychological safety,
- Establish trust and rapport between mentor and mentee,

– Make use of technology to connect,
– Enable the mentee to become their own agent of change and development.

1.4 Career Mentoring

Autoocupació launched mentoring services to support young people to re-engage with the labour market. The approach to mentoring is based on the experience supporting entrepreneurs starting their business and their mentoring services for those affected by the COVID-19 pandemic. As in mentoring for entrepreneurs during the post-start-up phase and support for entrepreneurs facing crisis, career mentoring at Autoocupació employs a non-directive, non-judgemental approach which aims to create a space of psychological safety where the mentee sets the agenda. Especially in interventions designed to overcome unemployment, a more directive approach to mentoring and coaching can be found. The agenda is often based on competency frameworks and is more concerned with performance and organisational fit. Additionally, such programmes are concerned with learning or improving skills to increase employability. Some critics of such approaches have raised the question whether such interventions actually serve employers or the beneficiaries of such interventions. We would argue that mentoring is most effective when the mentees have the power and influence to set their learning agenda.

Based on our experience as mentors, we would suggest to assume that mentees have the motivation and interest in securing work to live a self-determined life. However, unemployment can have a significant impact on feelings of belonging, self-worth and hope that the situation will improve. In extreme cases we noticed that mentees were so afraid of rejection that they preferred rather not to apply for jobs. This had nothing to do with a lack of motivation but more with a feeling of not being good enough or a feeling of belonging to a community where they are accepted as they are. The effect was a low level of dealing with frustration. Another observation we made is that mentees were used to others telling them what to do or what to think. As a result they developed strategies to escape or deal with such situations where they were simply told how to behave or what values and principle to adopt. Learning to be on time or punctuality is one value which can still be found in the expected outcomes of support programmes. We would argue that such values, which are clearly based on employer's values and principles, were never an issue. On the contrary, we noticed that when the mentees felt that the mentors do not tell them what to do but rather encourage them to think on their own, to set their own agenda and offer support where needed, motivation, commitment, trust and rapport were not an issue. This might somewhat contradict the experience of working with NEETs.

We would suggest to help mentees developing a map or a storyboard as a starting point to collect ideas around questions like:

– Which directions shall I take?

– What jobs should I apply for?

– What jobs where you turned down for and what jobs did you chose to decline?

– Where do you chose to live?

– What is something you want to have in your life?

These questions can serve as a starting point to jointly develop an agenda for career mentoring. Additionally, such conversations can contribute towards managing expectations and clarify what kind of support the mentee would like to receive from their mentors.

Based on the assumption that individuals need to maintain an appropriate balance between learning, using acquired skills and cruising in their professional endeavours in order to stay motivated and achieve an optimal level of positive challenge and growth. Conversations can be structured around learn-exploit-coast:

Learn: Engaging in the acquisition of new knowledge or skills, taking on challenges that push you beyond your comfort zone. During this stage, you will devote more time and energy to personal development.

Exploit: Apply new knowledge or skills to a job. This work is more routine and familiar, providing opportunities to practice and adapt knowledge. While there is still an element of learning, the primary satisfaction comes from making effective use of experience.

Coast: Navigating through tasks that pose minimal challenges, other than potential workload considerations. This stage may feel less rewarding, especially if it takes up a significant proportion of working time.

We encourage mentors to be cautious working with goals. Quite often we found that NEETs struggle setting goals. Sometimes because they did not know where and how they might find employment, sometimes working with goals, especially when not achieving them, created even more frustration. In the context of career mentoring, we also encourage *to coddiwomple* and to make use of this concept in the mentoring sessions.

Perceived barriers for young people to secure to a job are related to:

– Pro-activity: previous negative experience impact motivation resulting in a passive attitude.

– Self-efficacy: they don't believe they are capable.

– Resilience: low levels of frustration tolerance, related to negative experience in the past.

– Lack of personal experience in dealing with mechanisms of the labour market.

– Disadvantages in selection processes due to lack of previous professional experience.

– Disadvantages in recruitment processes: temporary, partial, underpaid and overqualified.

Some career mentoring programmes focus on the job search and application process. Based on our experience we would suggest to expand mentoring services. Securing a job is one aspect, maintaining a job presents another challenge. We all have work experience where we felt uncomfortable or found it difficult to deal with social practices at work. For young people who have limited or no work experiences it can be helpful to design mentoring services which involve employers in the process. Employers need to be aware that they have to offer an environment where young people can acquire the skills they need for the job. Mentors can support their mentees to navigate the world of work with its norms and practices. From conversations we had with employers, we learned that they are willing to help young people to acquire skills they need to master the job, that they understand to be patient and be aware that some NEETs will struggle. However, they need external support to address other perceived issues which can be based on personal issues of NEETs. Mentors can support their mentees to be better equipped to deal with disappointments and frustrations at work but also with the sometimes high demands. This understanding of working collaboratively, where the mentor focuses on supporting the mentee and their agenda but also supports the transition into the world of work should be developed further.

Perceived needs:

– Improve their level of self-awareness in order to define their professional goals based on their vocation.

– Improve their key skills for employability and job search, in particular their knowledge of how the labour market works and their ability to succeed in a selection process.

– Knowledge of the sectors and professions in which there is a higher rate of recruitment of young people and under better conditions.

– Improve their self-confidence

– Take control and be active in the job search and placement process.

1.5   Support for mentors

Autoocupacó offers continues support for mentors. During the project we asked mentors to share difficult situations they encountered working with NEETs. We positioned this ask as an activity which contributes towards the restorative and developmental support. These challenging situations made mentors ask themselves if they are good enough for the job. They also surfaced underlying issues which interfered with the mentoring agenda. Another issue was related to processes and techniques which were chosen by the mentor but did not work for the mentee. The ambition collecting such case studies is to support and encourage mentors to reflect about their practice.

Questions around identity, i.e. gender roles, norms and values of ethnic or religious minorities, questions around belonging, sometimes needed to be understood first. This social context can be easily missed. In the context of NEETs we found it extremely helpful to explore such issues first before trying to identify potential solutions. In other cases working with goals, making use of the GROW model (see section 2.3) did not work. What all cases had in common was the necessity to be on the side of the mentee. This can create dilemmas, especially when learning agendas have been set by third parties, i.e. sponsors of the programme.

Creating a space to discuss real cases has been a valuable learning experience which helps to reflect on practice and foster reflexivity of mentors. It also contributed towards improving Autoocupacó's approach to mentoring and adjust it to different social contexts and needs. In Annex 2 we share how we structured the case study series for mentors. We would strongly encourage to work with your own case studies.

2   Process Models

2.1   3-Stage Model

A process framework to be of help for the mentee. Alred and Garvey (2019: 31) point out the model can be used in many ways:

−   "To reflect upon what mentoring involves, and to assess yourself as a mentor
−   As a schedule for a mentoring meeting - to work through the stages
−   As a map of the mentoring process - to see what ground has been covered and what needs further attention
−   To review the mentoring relationship over time, as the mentee moves towards achieving the goals identified earlier in the relationship
−   To enhance shared understanding of the mentoring process and relationship, and to develop the mentee's ability to use the model independently"

Graphic 1: 3-Stage Model, adopted from Alred and Garvey (2019: 30)

Stage 1: Exploration

The simplicity as well as the flexibility makes this model so useful for mentors and their mentees not only in the context of a pandemic but also for working with entrepreneurs and in the context of career mentoring. Stage 1 creates an opportunity to explore the well-being of the mentee, develop a deeper understanding of the mentee's agenda for the mentoring sessions in general and for a singular meeting in particular. This phase invites to discover what is going on in the mentee's life and business as well as offering the mentee an opportunity to reflect. Reflection can be very helpful to develop a sense of what is going on, the personal response to current events and also on individual strengths, values and principles. Thus, this allows to focus on the mentee's agenda, helps

to frame a mentoring session, allows to negotiate how the mentor might be helpful and invites the mentee to take the lead and responsibility to decide how to approach a certain topic or issue.

Stage 2: New Understanding

Quite naturally the conversation transitions to Stage 2. Developing a new or better understanding of the events and situation is a rather important step for the mentee and will make it easier to explore different opportunities and choices. Rather than telling the mentee what to do or think this stage invites the mentee to think and reflect about a certain topic or issue and arrive at their own conclusion. Additionally, this stage invites the mentee to explore to think about external factors which can contribute to deal with a situation and to overcome challenges. Research highlights the impact of external factors such as other persons who might be willing and able to help. While this is the part the mentor has the least influence over it is also the most effective form of support. During Autoocupacó's mentoring learning events we invited mentors and mentees to share their experience and strategies dealing with current issues. Not surprisingly, mentors and mentees valued the exchange with like-minded people who found themselves in a similar situation. When asked for feedback it was the conversation with others which created a feeling of not being alone in "it" and an atmosphere where it is ok not to have the answer and rather think about potential solutions, develop new ideas through a conversation with others and being encouraged to experiment. It is critically important to allow time to go through this stage. One of the more general objectives of mentoring programmes as well as other helping professions is to strengthen the mentee's independence and trust to address challenges adequately without the mentor, coach or therapist. Kline (2020) argues that changing or making anything for the better depends on the quality of people's independent thinking. Independent thinking for Kline is a choice but requires an environment where the mind is stimulated by questions and the thinking and speaking is not interrupted. This thinking can positively be influenced through questions and by not interrupting the train of thoughts and words (Kline, 2020). It is this quality of independent thinking which allows the transition to taking action.

Stage 3: Action Planning

The transition towards Stage 3 does not necessarily follow a direct trajectory. It is likely to transition back and forth between Stage 1 and Stage 2. Depending on the sessions topic the mentee might need time to process the new understanding and has to let it sink in. Goals imply that the future is to some extent predictable based on previous experience. Alred and Garvey (2019) point out that sometimes the only action to agree on is setting up the next meeting and in order to take action the mentee needs to own the solution. The quality of action is firmly linked to the quality of Stages 1 and 2. Rather than focusing on quick solutions it is more helpful to explore opportunities, what is already

there and potential threats as this allows the mentee to get behind the action after thinking it through. For the mentee it is more important to experience that through their actions they can get back a sense of being in control and be able to navigate through the pandemic.

2.2 Versatility of the 3-Stage Model

We noticed a need for developing a better understanding of the effects of the pandemic with regard to business-economic aspects and personal implications such as social distancing, dealing with uncertainty and general well-being. Some researchers describe that as mentors they had to come to terms with their own feelings, well-being and trying to make sense of the situation while continuing working with their mentees. Therefore such a process model needs to be able to help mentors and their mentees to structure their conversations and address the mentee's issues adequately. Additionally, a process model has to be easy to understand and implement.

There are different ways of using a 3-Stage Model. Various issues can be address by rephrasing the different stages.

–   Stage 1: Current Picture (Problems. What are my issues, concerns and unused opportunities?)
–   Stage 2: Preferred Picture (Outcomes. What does a better future look like?)
–   Stage 3: The Way Forward (Plans. What do I do to create this better future?)

Another variation suggest of the 3-Stage Model is the 3C-Model:

–   Stage 1: Clarity – the challenges the mentee wants to address; clarity about the results they want to achieve, the things they can control in the situation
–   Stage 2: Creativity – options for achieving the results, consequences of those choices, other possible creative solutions
–   Stage 3: Concrete Results – conclusion related to the route they want to follow, contracting (with themselves) and commitment to achieve the results, specific actions to achieve the results.

The three process models vary slightly due to the context in which they are described. All models are designed to create a space where mentees can address their concerns, issues and problems adequately. The mentee's agenda comes first and the process models leads to action points where the mentee reflects and decides which route to take after evaluating different choices and their consequences. The recommended approach to mentoring in this context promotes making use of a 3-Stage Model as a framework and a process model during induction trainings for mentors and mentees and when supporting organisations to implement mentoring programmes. When we work with mentors we re-introduces the model to help them structuring their sessions with their mentees.

We would argue that for being effective such a linear process model brings structure, order and a sense of being in control into an otherwise chaotic, irrational world when used competently. Introducing the idea of exploration and experimentation as a significant part of the process which can lead to concrete actions was helpful for coming to terms with the current situation.

The wording of the different stages may lead to believe the model has a strong focus on addressing issues and finding potential solutions. In reality mentees are able to develop their own ideas and find adequate solutions without help from the mentor. Rather than looking for solutions mentees were looking for encouraging feedback and someone who trusted them to be successful. Exploring the variation of the 3-Stage-Model in more detail, it is easier to see that the model becomes more versatile by changing the name for each stage where Stage 1 and Stage 2 can lead to actions, where actions relate to reflection or concrete steps to explore a certain topic in more detail. More often than not, mentee's struggled to identify a specific topic they wanted to discuss. Especially during the pandemic a wealth of issues had an impact on mentees and added to their confusion which made it difficult to formulate clearly and express their thoughts and feelings. Using the variations of the 3-Stage Model consequently has had several advantages:

– Helps to create a natural flow of the conversation.
– Allows to focus the attention on the mentee rather than thinking about the next question or a technique which might be helpful.
– It offers a whole range of different conversations driven by the mentee's agenda.

In Annex 1 we present how we structured the induction and learning sessions for mentors and mentees. We would strongly suggest to offer these learning modules to mentors and mentees! Both, mentors and mentees benefit from a better understanding of the processes involved.

2.3 GROW

Whitmore (2017) has developed a 4-Stage Model, GROW; which he introduced in 1992. Since then GROW has been used successfully in various performance oriented settings, i.e. sports coaching. The sequence starts with exploring goals and ambitions of the coachee, explores what the perceived reality looks like, what options are available and explore the effort and commitment needed to achieve those goals.

– "Goal – What do you want?
– Reality – Where are you now?
– Options – What could you do?
– Will – What will you do?" (Whitmore 2017: 108)

Whitmore explicitly encourages to use the sequence with questions rather than telling coachees what to do and also underlines the importance of giving coachees a choice and allow them to set their own goals. Some researchers and practitioners argue that setting goals is a relevant part of coaching and mentoring to advance the mentee's agenda. Others suggest a more cautious use of goals. One of the objections is the issue of failing and the negative related effects. Goals by definition have a timeframe. In a situation where the mentees have been unable to predict the future and have had very limited control over it, setting goals is of limited use and will likely lead to more frustration and the loss of hope. We suggest to understand that goals have a "dark side" and raise the question of whose agenda they actually serve.

While the GROW model is largely popular it should be used with caution. The focus of the model is on performance and goal orientation. Breaking down goals into small, actionable steps helps to focus on what is important. However, such focus can lead to overlooking or neglecting the element of surprise, unpredictability and unexpected and how to deal with them adequately. Probably, it is the business-economic driven interest to be able to control and manage as well as execute a plan where the model shows its strength. However, predicting or controlling the future in the context of working with NEETs might be of limited use for the mentee.

We added the GROW model to this guide as it is widely used. However, in our mentoring practice we hardly ever use it.

2.4   Effectuation Process

Sarasvathy (2001) distinguishes between causation and effectuation processes. Causation processes follow the more traditional business-economic logic which are at the core of business plans. The desired outcomes are defined and the necessary resources, i.e. money, knowledge, staff, are used to achieve such results. Effectuation processes start with means the entrepreneurs already have and depend on the quality of interactions with self-selecting stakeholders, i.e. potential or existing customers, other actors (entrepreneurs). Decisions are based on affordable loss or acceptable risk. Through these interactions entrepreneurs create a new set of means. A key element of the process is to expect the unexpected and to embrace the element of surprise which results from interactions with stakeholders. Actors in the same sector are not considered to be competitors but rather potential business partners. The effectuation process becomes more relevant when the future cannot be predicted.

"Causation processes focus on the predictable aspects of an uncertain future. The logic for using causation processes is: To the extent that we can predict the future, we can control it. Effectuation, however, focuses on the controllable aspects of an unpredictable future. The logic for using effectuation processes is: To the extent that we can control the future, we do not need to predict it." (Sarasvathy, 2001: 252)
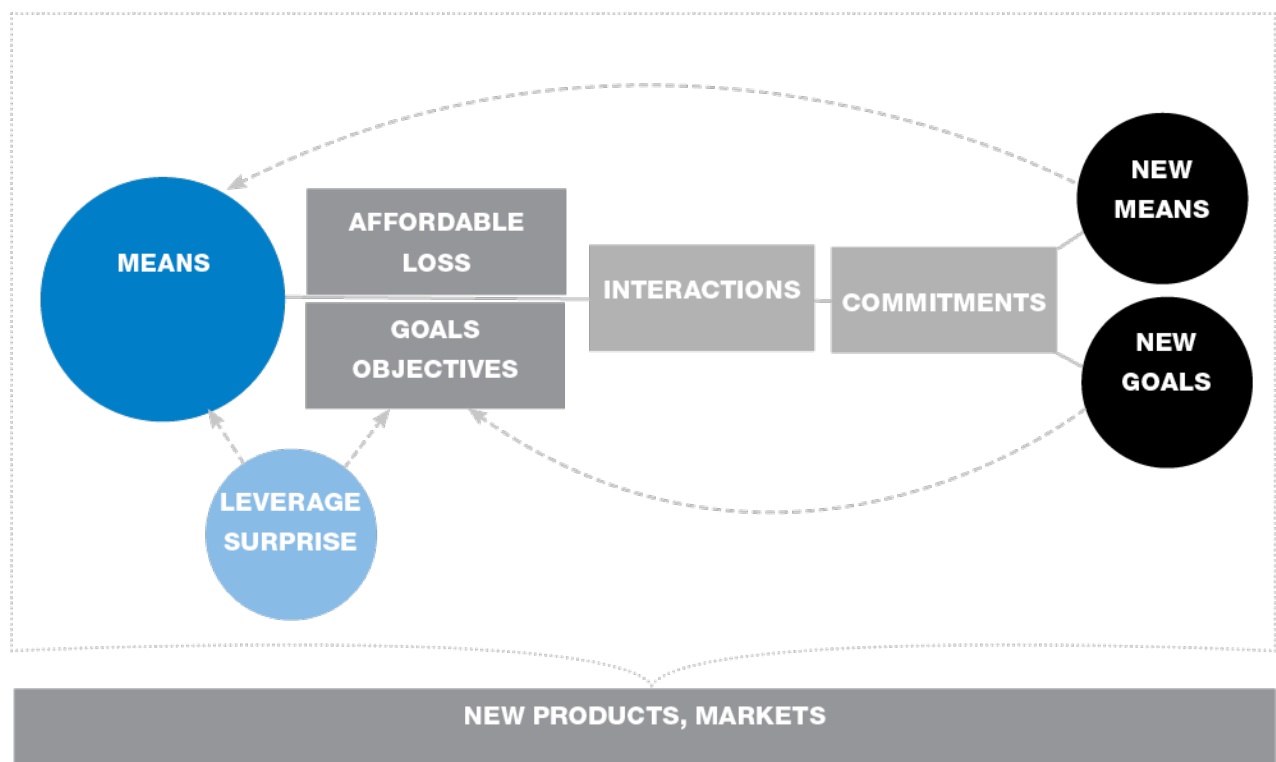
Effectuation Process: adopted from www.effectuation.org

We use this process as an additional layer of the 3-Stage Model where each element of the effectuation process starts with exploration, i.e. of means, affordable loss, people to contact etc., with the aim to arrive at a new understanding of what new markets or products could look like and finally to commit to concrete actions.

Such a process can help to focus on the controllable aspects of the mentee's life and career or business and reduces some of the stress induced by not being able to predict the future. More importantly though, effectuation processes encourage the mentee to find support outside and develop new means and resources will significantly increase the effectiveness of the mentoring relationship. Research estimates that with support from the outside clients will do better than 95% compared to those without such support (control group).

The value of the Effectuation process in practice is that it is a good fit in combination with the three variations of the 3-Stage Model and it helps to

- Explore and clarify the agenda of the mentee
- Explore the mentee's means and resources which are readily available to them
- Take action
- Explores new opportunities collaborating with others and by that helps to build-up external support
- Encourages to explore and develop new markets and products in collaboration with customers
- It includes the element of surprise and new developments and rather than seeing that as a threat it focuses on the opportunities.

2.5   Recommendations

We suggest to prepare mentees and mentors for their role. To this end we have developed a series of learning opportunities which we added to this guide in Annex 1. Based on the social practices and the social context in which mentoring takes place, we recommend to adjust the mentoring learning opportunities accordingly. We only match mentor and mentees who have completed a mentoring induction. In general, the induction training takes 2 to 3 hours and can be delivered in a classroom or virtually.

3 Ground Rules: Purpose and Function

3.1 Ground Rules: Purpose and Function

In general ground rules are critically important in any mentoring relationship. It is essential that both sides discuss the objectives of the mentoring relationship, clarify the expectations of each other and how they will manage the relationship. We suggest to agree on and clarify ground rules to establish a successful relationship where each party understands what is expected of them so they are able to play their roles in the relationship. Garvey (2018: 19; 1994: 18) suggests a dimensions framework to establish ground rules.

OPEN	– – – – – ▬ – – – – –	**CLOSED**
PUBLIC	– – – – ▬ – – – – –	**PRIVATE**
FORMAL	– – – – ▬ – – – –	**INFORMAL**
ACTIVE	– – – – ▬ – – – –	**PASSIVE**
STABLE	– – – – – ▬ – – – –	**UNSTABLE**
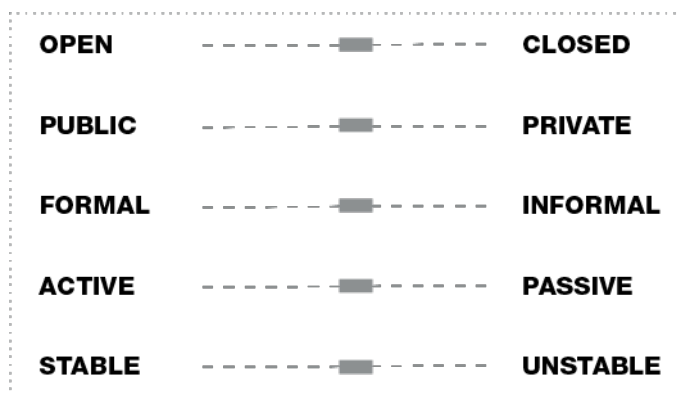
Garvey's Dimension Framework

‒ On the open–closed dimension the pairs clarify the topics to be discuss, which are included and which are off-limits. An open relationship includes all topics whereas a closed one excludes certain topics.

‒ On the public–private dimension the pairs clarify who should be informed and possibly included in the relationship. In a public relationship other people know that the relationship exists whereas in a private one others are not aware of it or only a very limited number of people, i.e. the mentoring relationship manager.

‒ On the formal–informal the dyads agree to meet regularly or when necessary, to follow a certain agenda or to discuss topics as they become relevant for the mentee. The formal refers to agenda, schedule rather than to the character of the relationship.

‒ On the active–passive dimension the pairs clarify their roles. This includes the expectation of how active or passive the mentor is supposed to be. It also includes interventions of the mentor on behalf of the mentee.

–   The stable–unstable dimension refers to the behaviour of both parties regarding predictability of behaviour and security. Consistency and regularity help to create an atmosphere of psycho-social stability and trust.

We suggest not to assume but to actively clarify the different dimensions. Garvey (1994) demonstrated that these dimensions are not static and change over time. Hence, it is important to re-visit and re-negotiate the different dimensions of the ground rules as the relationships change over time. Based on the recommendation of researchers and practitioners, we suggest to negotiate the agenda during Stage 1 of each session. This is also a good opportunity to explore and clarify the different dimensions and roles. Ground rules help to create an environment in which learning is encouraged, they also contribute to enable mentors and mentees to be at ease and trust the process being an integral part of the process model.

3.2   Ground Rules: Evaluation

During mentor induction trainings, we noticed a certain insecurity among mentors when they were not sure about what their role is, if they are expected to take a more active part in the conversation for example. This can lead to some unwanted behaviour on the side of mentors where they jump in too early and offer advice, share their experience or present potential solutions to a problem identified by the mentee. In an adult learning environment it is critically important to allow mentees to arrive at their own conclusion, develop trust in their decisions and by that become independent from the input of their mentors.

Reflecting on their practice, mentors reported that if they did not carefully clarify how they as mentors could help to address a particular issue and how active or passive the mentee expected them to be, they regularly found themselves in a situation where they were unsure whether the sessions were helpful to the mentees. While mentees, when asked, reported back that the session were useful or somewhat useful it left the mentors with a rather uncomfortable feeling. Being too active or contributing to solutions too early and too soon took away a great deal of learning opportunity from their mentees. Additionally, any form of advice, shared experience and contribution to solutions of the mentee's issues take away the opportunity to develop their own solution, trust their thinking and by that improve their self-esteem as well as strengthen their independence. After discussing this issue in more detail mentors included a contracting sequence into Stage 1 as part of the exploration. Doing it this way felt very natural and does not impact the flow of the conversation negatively.

Research suggests that the quality of the working alliance contributes significantly to the effectiveness of the intervention where 69% of the relationships are more effective compared to a control group. Creating an atmosphere where learning is a social activity and can be transformational rather than just transactional has been especially valued by mentees. Some researchers describe that mentors became a "lifeline" for their mentees during the pandemic. The feedback we received from the mentees was that they really appreciated having that one person who showed up, didn't leave and listened to their concerns and ideas. Using virtual meetings creates another dimension which needs to be addressed. By using video calls we invite the other one into our living rooms, kitchens – into our homes. This can create an issue on the open/closed aspect and has to be considered with regard to gender and different cultures and norms.

Garvey (1994) highlights two relevant aspects. There is a probability that the dyads have different perceptions on the nature of their relationship which can create issues. For an effective working alliance it is important that both parties have the same understanding of the different dimensions of their relationship. In practice we noticed that with the same mentee the ground rules can change quickly where during one session it can be an open conversation and in another certain topics are excluded depending on the mentees willingness to address them. Therefore, we find it good practice to re-negotiate what is in and what is out. Our approach to mentoring strongly encourages to implement a mentoring programme manager (MPM) who is the main point of contact for the dyads. A MPM can check-in regularly and evaluate whether the relationship is working or not and offer support when needed. Especially, when the pairs have a different understanding of the dimensions framework they able to address such issues effectively.

Recommendations

The nature of the mentoring relationship changes over time. Mentoring programmes benefit significantly from implementing a mentoring manager (MPM) who monitors the relationships, offers additional support directly or by engaging relevant expertise (i.e. from other mentors). As the mentoring relationship develops the ground rules need to be re-negotiated or can be a reason for failing working relationships. MPMs can help to avoid misunderstandings through monitoring and evaluation and bring in external expertise if the dyads feel it necessary.

4   Skills and Techniques

4.1   Techniques, Skills and Choices

Some practitioners and researchers encourage mentors to build their own library of techniques. However, they also argue that using techniques may develop a dynamic where the technique becomes more important than the mentee's agenda. A technique might not be suitable for the mentee's learning style or focus too narrowly on one issue, i.e. decision making. Therefore, techniques have to be selected carefully by mentors and used in line with the chosen process model and the intended output and outcome of the related stage of the process model.

One of the observations we made when training mentors is that there seems to be an unquenchable thirst for techniques. It could be argued that for mentors it can be helpful to have a wealth of different techniques at their disposal as long as they have practiced them and are able to use them expertly. It seems to be good practise as a mentor to make use of techniques to help advance the mentee's topic, to think something trough to arrive at a new or better understanding of their own and in their own time. Taking the time to create an atmosphere in which such thinking is possible, what Kline (2020) calls a thinking environment, is less a technique than an active choice. It is fair to say that listening, asking questions, empathising and being present is a choice. And it is this choice that helps to establish the relationship, build rapport and trust, and thereby form a stable and effective working alliance, which contributes significantly to the success of a mentoring relationship.

4.2   Time to Think

Creating a container of psychological safety is at the heart of Kline's (1997) Time-to-Think model. It is based on the assumption that our minds work best in the presence of questions. Kline argues that the quality of our actions depend on the thinking we do first and our thinking depends on the quality of attention for each other. Paying "beautiful attention" to the thinker requires to be present and to focus the attention on the thinker. The model offers time and a safe space where the thinker is invited to develop their own thinking and arrive at their own conclusions. Reflecting on mentoring sessions mentors might be surprised by the quality of their mentee's thinking and how much they are able to solve issues on their own. Kline's model is a valuable example of a technique which can be easily used in a mentoring conversation but which needs practice and experience to encourage independent thinking.

4.3 Dialogic Choices

A core skill of mentors is being able to ask questions which help and encourage the mentee to think differently. Garvey suggests eight different dimensions of questions:

Garvey: Dialogic Choices

Depending on the mentee's agenda a mentor can guide the conversations and help the mentee to explore different aspects of an issue. Asking questions on the social dimension allows the pair to establish rapport. Asking questions related to the technical, tactical and strategic dimension can help the mentee to explore and develop a new understanding of a certain situation. Questions on the behavioural and self-insight dimension can be an invitation for the mentee for reflection. The value of these dialogic choices for mentors are that they can help to structure the conversation and systematically think through complex issues. Again, it is a choice mentors can make to ensure that the conversations are not always around topics where they feel most comfortable but help to advance the agenda of the mentee. It also allows to explore blind spots or issues mentee's might not be aware of. Obviously, exploring the unknown needs explicit permission from the mentee.

4.4 Effectuation Principles

Sarasvathy (2008) has developed five principles based on semi-structured interviews with successful entrepreneurs:

1. Bird-in-Hand Principle: Entrepreneurs start with means they have, people they know, knowledge they have

2. Affordable Loss Principle: Entrepreneurs determine how much they want and actually can risk to pursue a goal

3. Crazy Quilt Principle: Entrepreneurs set out to build a network of self-selecting stakeholders which contribute to achieve their picture of success

4. Pilot-in-the-Plane Principle: Entrepreneurs take actions based on the assumption that waiting for others or the situation to change is not helpful pursuing their goals and objectives

5. Lemonade Principle: Entrepreneurs are aware that things change, they embrace surprises and expect the unexpected

Especially the first three principles, Bird-in-Hand, Affordable Loss, Crazy Quilt, have been very helpful for mentees in the context of entrepreneurship before and during the pandemic.

Bird in Hand	**Crazy Quilt**	**Affordable Loss**
WHO AM I? What are my values and beliefs? What are my passions? What do I think should be my role in society? What value do I want to create in the future? What matters to me? WHAT DO I KNOW? What are my core activities? What is that I have superior knowledge about? What do I consider my core competences? What assets do I own? WHO DO I KNOW? Who do I consider network partners with whom I can co-create new business models with? Who do I consider to be our most demanding clients? WHAT DO I HAVE? What money to I have to invest in a business? What equipment and space I have available?	At a very early stage, to start engaging with other people inviting them to be partners or clients. ADD TO YOUR LIST OF 'WHO DO I KNOW?' persons who can: – help you developing a better understanding of markets and customer needs – help you developing fresh ideas – tell you who you need to know and who does what – is able to facilitate and connect you to people who can help – provide constructive feedback, challenge decisions and thinking – strengthens your resolve at difficult times and gives a sense of purpose	Can I afford (financially) what I would be investing in this initiative? Am I aware of the possible negative impact a disaster would have on my current business image? How much time of my life would I be willing to invest to make this idea work? How could I decrease the potential risk I am taking and while still moving forward?

Effectuation Principles: adapted from www.effectuation.org

The Effectuation Process and the related principles focus on the mentee's agenda and can help to address a wide range of issues. Quite often mentees are their biggest critics which sometimes obstructs the view on their achievements, their skills, values and motivations. As Kline (2020) argues, it should be the mentees discovering these things on their own. One of the most important

aspects of using these principles as a technique during mentoring is that it has an element, the Crazy Quilt principle, which encourages the mentees to actively build relationships and assets outside the mentoring relationship and by that strengthening their independence.

4.5   Recipes – combining different techniques

In this section we would like to offer an example of how to combine different ideas. It might be helpful to think of it as recipes. Rather than thinking of techniques as standalone applications it might be more helpful to use them in combination with a process model and other techniques. So rather than using one specific technique they might be more useful when combined with others.

The (real) story of an entrepreneur who was overwhelmed by the situation may serve as an example. To help the entrepreneur to focus on what he can control and influence Covey's (2020) Controlling the Controllables model (Circle of Influence) was used in a first step, then the mentor suggested to formulate action points in an action plan and in a last step evaluate his motivation to execute the plan using a scaling techniques. The tasks looked like:
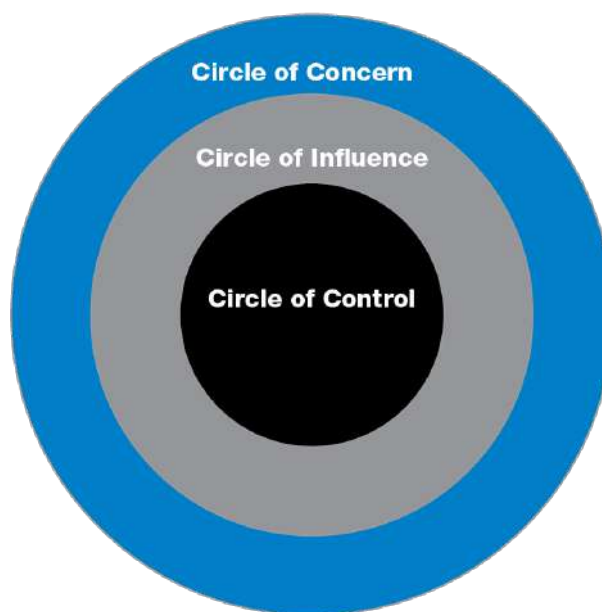
Circles of Influence & Control

Step 1: Write down what's on your mind?

This task relates to Stage 1: Exploration.

Circle of Concern

Step 2: place those issues you can CONTROL in the Circle of Control and those you can INFLUENCE in the Circle of Influence. These steps are related to Stage 2: New Understanding.
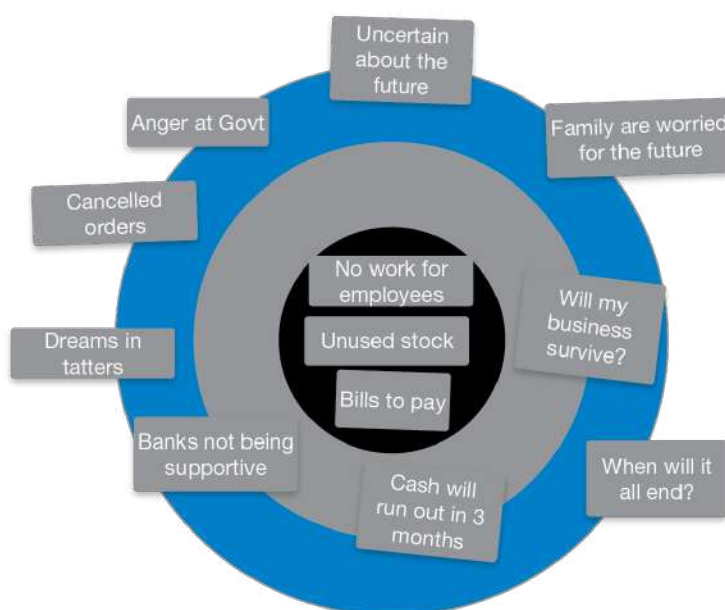
Circles of Influence & Control

Step 3: Action Plan, where the Circle of Control has top-priority; Circle of Influence needs to be addresses as soon as possible, Circle of Concern will be addressed when there is time. These tasks are related to Stage 3: Action Planning.

To do	Activity (what?)	Who responsible	Who can help?	Completed until (date)	Follow up
work for employees					
make use of stocks					
Take care of bills					
Talk to banks					
Manage cash flow					
alternative business models					
Talk to family					
Talk to customers	How can I help?				

Action Plan

Step 4: Scaling: On a scale from 1 to 10 – how likely is it that you execute the plan, where 1 is "over my dead body" and 10 is "I am utterly committed to this!)

This example may serve to illustrate the relevance on having a solid foundation using a process model such as the 3-Stage Model. Stage 2 can be used to evaluate the different choices and suggested actions points rather than loosing focus of the overall process an being distracted by the various techniques.

4.6   Remote Mentoring

COVID-19 related restriction, such as social distancing the need to work remotely, required shifting to remote mentoring sessions. This required to review techniques against whether such techniques can be used during phone or video calls. The technology is readily available to support remote mentoring and virtual collaboration, i.e. miro.com or mural.com, which allow to make use of templates for a whole range of topics. In the context of mentoring for enmtrepreneurs, techniques are based on Design Thinking and Lean Strat-Up approaches and allow the dyads to make use of

them. While the technologies to support remote mentoring exist they can distract from the mentoring process itself where the technology and the techniques used become too dominant and distract so that the focus of attention shifts from the mentee to the technology. Another aspect to be considered carefully is that the use of such technologies asks for rather good and stable internet connections, sufficient data volume, powerful computer and tablets. Especially low income communities still struggle with such requirements. Therefore, the choice of techniques needs to be considered against the technology the mentee has access to rather than what is readily available.

5 Recruitment

5.1 What are the criteria to become a mentee?

Mentees have to attend an induction training. During the induction training mentees will learn about the different roles in mentoring, mentoring processes and techniques, their responsibilities, what to expect from a mentor, the matching process, monitoring and evaluation and the support from the mentoring manager. After induction training mentees will complete the mentee profile and be available for a 30' interview to clarify their needs and expectations.

Eligibility criteria:
– Commitment to working with a mentor.
– Accessible, reliable and able to meet commitments.
– Be proactive.
– Be prepared to give (and receive) feedback.
– Be honest.
– Be open to new learning opportunities.
– Understand that your mentor does not have all the answers.
– Time commitment: 3-4h per month over a period of 3–6 month

5.2 What is the motivation to work with a mentor?

– Improved/new/alternative business model
– Improved job search and job application skills
– Avoid mistakes/make better decisions
– Honest feedback/sounding board/safe space
– Improve/build professional networks
– Learn from experienced entrepreneurs
– Personal development
– Balance personal and professional life better
– Developing resilience, deal with uncertainty

5.3 What are the criteria to become a mentors?

– Good communication and interpersonal skills
– Commitment to working with a mentee and values of the programme

- Capable of developing the skills of entrepreneurs to make strategic business decisions for themselves
- Ability to maintain appropriate boundaries while providing valuable guidance during business start-up
- Be motivating, be patient
- Ability to work with people who are likely to have different views and experiences
- Providing positive and constructive feedback and challenging assumptions
- Ability to relate and empathise with women and their aspirations
- Good listening and observation skills
- Accessible, reliable and able to meet commitments
- Entrepreneurship experience, i.e. owner/manager, managing projects
- Marketing and/or financial management experience
- Entrepreneurship background is desirable
- Experience in career management, HR (career mentoring)
- Sector specific knowledge
- Time commitment: 2-4h per month over a period of 3–12 months

5.4 What is the motivation to become a mentor?

During the recruitment and registration process we ask volunteers why they want to become mentors. Mentoring is a social activity and at its core it is two-way-learning relationship. Below is list of typical reasons why volunteers decide to become mentors:

- "Although this question asks for personal reasons, professionally, I am keen to understand how our community programmes can support micro and small business owners through mentoring. I would like to extend mentoring as one of the interventions in many of the programmes should it deem fit."
- "Personally, I would like to meet people from different background and be inspired."
- "This project is a great way to give back to the community."
- "I would like to contribute to the society and help someone by mentoring / coaching them in their journey."
- "Learning. Always learning. Regardless of what position I'm in – mentee or mentor."
- "My motivation to become a mentor comes from my positive experience in being a mentee. I want to share what I've got."
- "Like most mentors, I would like to be able to support another individual have clarity on issues and decisions they face in their business. I have always received some sort of support and would be happy to do the same for others."

- "Because we all have something, we can learn from each other, I am hoping to learn and to increase my network."
- "Firstly, I would like to pay it forward. I have been privileged to have great mentors around me who have guided me throughout my career and personal journey.
- "I believe I have acquired some skills that are transferrable and hopefully will help the next generation of women prosper."

6 Screening & Selection

Screening and selection is one of the most important processes within a mentoring programme. Screening is a process performed by the organisation to ensure that the right match is made between the work to be done and the person who will do it. A robust screening and selection process will help to ensure that the volunteers are a) suitable for the mentoring role by meeting the established criteria and b) are safe to work with your entrepreneurs. Criteria for interviews

An application form collects basic information - name, address, experience - while giving the organization permission to do reference checks and police records checks (if necessary). Asking volunteers to complete an application form signals the seriousness of an organization's commitment to screening and provides a paper trail that will protect both the volunteer and the organisation.

Mentors and mentees will be invited for interviews if they have:
– Completed the induction training
– Completed the mentor/mentee profile (Annex 3 and 4)

6.1 Template letter for those attending interviews

As we intend to follow up with interviews directly after the mentors/mentees completed the induction training and mentor/mentee profile the mentoring manager will send an email to arrange for a 30 minutes interview.

Dear [Name of applicant],

Thank you for taking the time to complete the mentor /mentee profile for the position of Volunteer Business Mentor with [name of programme] mentoring programme. We would be delighted if you could attend a thirty minute discussion meeting to discuss the role and to meet a member of our team.

Please email me at mentoring@kiz.de at your earliest convenience, and I would be pleased to arrange a mutually convenient time and date with you.

Our Volunteer Business Mentors are vital to the success of our entrepreneurs and we look forward to meeting you to learn more about how you can support us.

If you have any other queries, please feel free to contact me.

With my best wishes,

[Name/Position]

[Name of organisation]

7   Matching

Matching is a key part in the overall design of a mentoring programme and needs to be clearly defined and agreed to up front. Matching is often the stage in mentoring that people ask the most questions about, and have the greatest expectations from. The more transparent you can be about how the matching process works, the greater commitment you will get from participants. Matching is not an exact science and it often relies on 'gut instinct' or intuition based on the information the Mentoring Manager has gathered. The more similarities mentors and mentees have, the easier it is to establish a good working relationship and build trust. The greater the differences, the more opportunities there are to learn from each other.

Matching – an imperfect art, not a science

A successful mentoring relationship requires the right mix of chemistry, knowledge and skills and is as much an art as it is a science. Some researchers and practitioners argue that successful matching occurs when the mentee and mentor share a similar value and belief system. Matching is therefore a key part in the overall design of a mentoring programme and needs to be clearly defined and agreed to up front. The more transparency there is in how the matching process works, the greater commitment the organisation will get from participants.

Sometimes we see mentoring managers who try to make the perfect match based on personal and professional characteristics. We recommend to interview both, mentor and mentee and share the respective profile. Additionally, the rationale for the match should be shared. In our experience, mentors and mentees have an interest in making the relationship work. We recommend to kick-off the relationship by asking the dyads to work together for three sessions and if the match does not feel right, the mentoring manager will look for a different match (no fault divorce clause).

7.1   Minimum Standards

The mentoring programme considers the relevant characteristics of the mentor and mentee when matching (skills, geographical area, gender, personality, availability, preferences of the mentor/mentee). Where possible, mentors and mentees have an input into who they will be paired with.

There are processes in place to manage a match that does not work. The mentor and mentee have been provided with a briefing before their first meeting. Mentor, mentee and if possible the mentoring manager sign a *Mentoring Agreement* which consents to the programme's requirements (e.g. roles, meeting frequency, reporting requirements, expectations etc.).

The match provides appropriate learning opportunities for both the mentor and mentee. The time between training and matching does not exceed two months. Mentors and mentees are kept informed if the match takes longer than expected. The matching process is reviewed regularly to ensure feedback is integrated back into the programme.

7.2   Enhancements

The Mentoring Manager facilitates the first meeting between the mentor and mentee. The Mentoring Manager follows up with the mentor and mentee after they have had two to three meetings to understand whether the match has worked out. Mentors and mentees are given a "no fault divorce" clause or "graceful exit" clause should the relationship not work out after the first few meetings.

7.3   Matching criteria

Relevant matching criteria are whether the mentor's experience fits with the mentee's needs. Other criteria to take into consideration include:

– Shared values and beliefs (compare Annex 3 and 4)
– Availability
– Learning styles
– Skills/expertise
– Location
– Entrepreneurship experience
– Sector specific knowledge
– Experience gap
– Interests (compare Annex 1 and 2)

8   Monitoring

Monitoring of the dyads allows to determine whether the relationship is working successfully and identify potential problems at an early stage. The mentoring programme manager offers additional support to mentors and mentees in case the need arises. This could be offered by engaging other mentors of the programme or by facilitating contacts to other entrepreneurs who either deal with the same challenges or have already solved them. Monitoring also allows to evaluate the performance of the relationship and assess goals (i.e. developing entrepreneurial skills and personal development). The monitoring mail should invite mentors and mentees to complete a form. Completing the form, which can be created with Google Forms, Microsoft Forms or Survey Monkey, should not take longer than 5 minutes. The suggested monitoring process actually takes 2 minutes to complete. It is more important to get high participation rather than evaluating outputs and outcomes at this time. A more in depth analysis should be conducted every three month or, at a minimum, every 6 months.

The mentoring programme manager follows up directly on dyads who did not participate in the monitoring process. For the follow-up phone calls and text messages are more effective than emails. It is important to develop an understanding of the status of the relationship:

– Have the dyads met?
– Is the matching working for both parties?
– Are there any issues which need to addressed?

8.1   Monitoring requirements

All mentors and mentees agree to participate in the monitoring process. Every month the mentoring programme manager will send a monitoring email with a link to a form of five questions:

1.   How useful were the last meetings with your mentor?
   a.   Very useful
   b.   Useful
   c.   Less useful
   d.   Not useful

2.   How satisfied are you with the cooperation with your mentor?
   a.   Very satisfied
   b.   Satisfied
   c.   Less satisfied

    d.   Not satisfied

3.   How often did you meet with your mentor?

    a.   More than 4h per month

    b.   2h - 4h per month

    c.   Less than 2h per month

4.   Did you focus on hard skills (strategy, financial planning, marketing & sales) or soft skills development (project and time management, presentation, communication, dealing with stress, grit, confidence, setting goals)?

    a.   Focus on Hard-Skills

    b.   Focus on Soft-Skills

    c.   We work on business related and personal topics

5.   Comments (anything you would like to share with us?)

8.2 Evaluation of monitoring forms

One of the main objectives of the monitoring process is to assess whether the dyads have formed a working alliance. A good working alliance contributes with 69% to the effectiveness of the mentoring relationship compared to a control group. Relevant in this context is the opinion of the mentee. Therefore, we suggest to evaluate carefully, especially during the early stages of the mentoring relationship, whether or not the dyads found a common basis for their collaboration. As a rule of thumb, we can safely assume that the mentee will be very satisfied with the mentor:

– When the mentee's agenda is at the forefront of everything
– When challenge and support are balanced right according to the mentee's needs
– When the mentor follows a non-directive approach

Question 1: A subjective feedback from mentee and mentor help to understand the quality of the working alliance. Usefulness can be interpreted as an indicator that the relationship is working and the mentee and mentor get something out of it. Any feedback in the area of "Less useful" or "Not useful" would require a follow-up call by the mentoring programme manager as this should be treated as a dysfunctional relationship.

Question 2: The cooperation between mentee and mentor is critically important as mentioned earlier. A good working alliance is a key success factor in mentoring. Any feedback indicating "Less satisfied" or "Not satisfied" needs immediate intervention. In our experience it is helpful to re-visit the different dimensions of ground rules and expectations. A positive feedback "Very satisfied" and "Satisfied" indicates a working alliance which will very likely lead to satisfactory outcomes.

Question 3: The frequency of meetings is a good indicator to follow-up and very the feedback from Question 1 and 2. At a minimum meetings of 2h–4h per month should be expected. Less than 2h per meeting requires a follow-up. While it is quite a common phenomenon that dyads have times with less frequent meetings, mentoring during a pandemic would require at least 2 meetings per month.

Question 4: A focus on hard skills can indicate that the relationship between mentor and mentee is at an early stage. Only when trust and rapport between the dyads has been established more personal issues will be discussed. Personal issues are sometimes related to soft skills and personal development.

The mentee's agenda should always have priority and it should be the mentee who sets the agenda. It is the mentor who helps the mentee to address their topics adequately. However, mentors will have a preferred approach to mentoring. Especially in the early stages of the relationship a focus on more technical, tactical and strategic topics can be expected (see section 4.3). As the relationship between the dyads develops more personal topics will be addressed. Such a development can be identified through Question 4.

Question 5: This section should be used to provide an opportunity to share feedback and ask questions, i.e. for additional support. In practice Question 5 is used more often to feedback on the quality of the matching and the working alliance in general. Thus, it offers more insights and helps the mentoring programme manager to assess the quality of the relationship.

9 Evaluation

This section intends to provide an overview of how to evaluate a mentoring programme. We recommend to invest some time during the design phase of the programme to design a theory of change and how to assess the outcomes and impact of the programme. Regularly, sponsors of mentoring programmes expect to see quantitative and qualitative data collection. For the quantitative data collection we would like to offer some ideas and possible solutions. For the qualitative data collection, we would recommend an Interpretive Phenomenological Analysis and/or focus group interviews. We found it helpful to collaborate closely with academics and researchers who specialise in impact assessments.

The evaluation process is designed to be implemented by the mentoring programme. It tries to capture two main outcomes:

– The outcomes of the intervention (satisfaction, usefulness)
– Suggestions to further improve the mentoring programme

Depending on the objectives and targets of the programme it is worth collecting additional information and data (KPIs). Some are more related to the mentee and mentor, some are related to the overall programme:

9.1 Programme related KPIs:

– Number of mentees engaged (i.e. through training)
– Number of mentees disaggregated by gender (women/men)
– Number of mentors engaged (i.e. through training)
– Number of mentors disaggregated by gender (women/men)
– Number of matches
– Number of matches disaggregated by gender (women/men)
– Number of active relationships
– Average duration of the relationships
– Average number of hours of mentoring per match

9.2 Evaluation form for mentees

1. **How would you rate the usefulness of the mentoring programme in helping you to manage, sustain and grow your business/securing a job?**
   a) Very useful

b) Useful

c) Less useful

d) Not useful

2. **How do you rate the working relationship with your mentor?**

a) Very useful

b) Useful

c) Less useful

d) Not useful

3. **How often did you meet with your mentor?**

a) Weekly

b) Every 2 weeks

c) Monthly

d) Every 2 months

e) Quarterly

4. **How do you rate the frequency of the meetings?**

a) Very useful

b) Useful

c) Less useful

d) Not useful

5. **Do you feel that the mentor is responsive and available to assist you when you need them?**

a) Always approachable and available

b) Usually approachable and available

c) Sometimes approachable and available

d) Never approachable and available

6. **How do you rate the mentor's willingness to address your needs, concerns or worries on a scale from 1-10?**

(where 1=not very willing and 10 always willing to address my needs, concerns or worries)

Natural number

7. Do you think that your mentor has the right skills and experience to help you?

    a) Very useful

    b) Useful

    c) Less useful

    d) Not useful

8. How do you assess the evolution of your business/career since working with a mentor on a scale from 1-10?

(Where 1=no significant development and 10=quick and sustainable development of my business)

Natural number

9. Please tell us to what extent mentoring has influenced you:

Text field

10. What significant changes have occurred in your business since you have worked with your mentor?

Text field

11. How would you evaluate the future of your business/professional life?

    a) Very optimistic

    b) Somewhat optimistic

    c) Not very optimistic

    d) Pessimistic

12. How likely is it that you will continue trading (this question is for mentoring entrepreneurs)?

    a) Very likely

    b) Somewhat likely

    c) Not very likely

    d) I did end trading

13. In your opinion, where have you improved your professional and personal skills?

Management (corporate)		Employees / Recruitment / HR	
Business planning		Accounting, bookkeeping	
Business strategy; business models		Tax related issues	

Product and product development		Legal issues	
Marketing/PR		Information and communication technologies	
Digital Marketing		Web/Search Engine Optimization	
E-commerce		Financial management	
Sales		Access to finance	
Customer development/ customer relationships		Time- and self-management	
International trade		Building professional networks	
Social entrepreneurship		Working with others	
Decision making		Resilience	
Career planning		Job search strategies	
Other (please specify)			

14. On a scale from 1-10, how likely is that you would recommend other entrepreneurs to work with a mentor?

natural number

15. In your opinion, how might we improve the mentoring programme?

Text field

9.3   Evaluation form for mentors

1. **How would you rate the usefulness of the mentoring programme in helping your mentee to manage, sustain and grow their business/professional career?**
   e) Very useful
   f) Useful
   g) Less useful
   h) Not useful

2. **How do you rate the working relationship with your mentee?**
   e) Very useful
   f) Useful

g) Less useful

h) Not useful

3. **How often did you meet with your mentee?**

f) Weekly

g) Every 2 weeks

h) Monthly

i) Every 2 months

j) Quarterly

4. **How do you rate the frequency of the meetings?**

e) Very useful

f) Useful

g) Less useful

h) Not useful

5. **Do you feel that the mentee is responsive and available to work with you?**

e) Always responsive and available

f) Usually responsive and available

g) Sometimes responsive and available

h) Never responsive and available

6. **How do you rate the mentee's willingness to address their needs, concerns or worries adequately on a scale from 1-10?**

(where 1=not very willing and 10 always willing to address my needs, concerns or worries)

Natural number

7. **Do you think that you have the right skills and experience to help your mentee?**

e) Very useful

f) Useful

g) Less useful

h) Not useful

8. **How do you assess the evolution of your mentee's business since you have started working together on a scale from 1-10?**

(Where 1=no significant development and 10=quick and sustainable development of my business)

Natural number

9. What have you learned from your mentee?

Text field

10. What significant changes have occurred in your mentee's business/professional life since you have worked with your mentee?

Text field

11. How would you evaluate the future of your mentee's business/career options?

e) Very optimistic

f) Somewhat optimistic

g) Not very optimistic

h) Pessimistic

12. How likely is it that your mentee will continue trading (for entrepreneurs only)?

e) Very likely

f) Somewhat likely

g) Not very likely

h) I did end trading

13. In your opinion, where has your mentee improved their professional and personal skills?

Management (corporate)		Employees / Recruitment / HR	
Business planning		Accounting, bookkeeping	
Business strategy; business models		Tax related issues	
Product and product development		Legal issues	
Marketing/PR		Information and communication technologies	
Digital Marketing		Web/Search Engine Optimization	
E-commerce		Financial management	
Sales		Access to finance	
Customer development/ customer relationships		Time- and self-management	
International trade		Building professional networks	

Social entrepreneurship		Working with others	
Decision making		Resilience	
Career planning		Job search strategies	
Other (please specify)			

14. On a scale from 1-10, how likely is that you would recommend others to become a mentor?

natural number

15. In your opinion, how might we improve the mentoring programme?

Text field

9.4 Enhancements

In order to develop a better understanding of development of the entrepreneur. An entrepreneurship/ employment grading path can be used to captured some outcomes of the mentoring intervention. The entrepreneurship grading path has been developed by Prof. B. Scheck and Dr. G. Parola from Munich Business School in 2020. The assessment form can be used at the beginning and the end of the mentoring relationship. Mentor and mentee can discuss the assessment form together during the second or third meeting to identify areas where the mentee would like to improve. At the end of the relationship the dyads can revisit the assessment form and indicate where learning and development did occur.

9.4.1 Entrepreneurship/Employment grading sheet

ENTREPRENEURSHIP PATH GRADING SHEET

NAME AND SURNAME

EVALUATION PREPARED BY

1= fully insufficient/fail   2= insufficient/fail   3= very unsatisfactory/fail   4= unsatisfactory/fail   5= almost satisfactory/fail   6= satisfactory   7= very satisfactory   8= good   9= very good   10= excellent

| MODULES	1	2	3	4	5	6	7	8	9	10	GRADE / Comments
1 BUILDING CONNECTIONS & SELF-ASSESSING YOUR ENTREPRENEURIAL PROFILE											Mean score: ___
He/she is able to identify key people that could support him/her in the pursuit of his/her goal.											
He/she is able to network and build good business relationships.											
He/she is able to be self-critical.											
He/she is able to identify which skills he/she needs to develop.											
2 DEVELOPING YOUR BUSINESS IDEA											Mean score: ___
He is able to spot business opportunities.											
He can take advantage of unusual opportunities to make progress.											
He/she is able to critically evaluate his/her idea.											
2 DEVELOPING YOUR BUSINESS MODEL											Mean score: ___
He/she is able to act in stages by creating a step-by-step strategy and prioritizing goals.											
He/she is able to meet deadlines and properly manage time.											
He/she is able to exlain how to create value by offering a product or service.											
He/she is able to identify target customers and how to reach them.											
He/she is able to identify competitors and their strategies.											
He/she is able to plan a sustainable relationship between efficiency and quality.											
4 TESTING YOUR MARKET											Mean score: ___
He/she avoids uninformed guesses and relies on evidence-based decision making.											
He/she is able to conduct surveys and gather evidence in the market.											
He is able to adapt his/her plans to changes according to market variables.											
5 PLANNING YOUR BUSINESS											Mean score: ___
He/she has a clear long-term vision.											
He/she is able to plan measurable goals and ways to evaluate the progress.											
He/she accepts moderate chalanges with good chances of success.											
He/she is able to reduce chances of error by considering alternative decisions.											
He/she is able to identify potential obstacles and plans ways to overcome them.											
6 SELLING YOUR PRODUCT											Mean score: ___
He/she is able to create clear stategies to reach target customers.											
He/she values relationship with customers and plans how to cultivate them.											
He/she searches for ways to improve his/her product or service to increase customers' satisfaction.											
7 FUNDING YOUR BUSINESS											Mean score: ___
He/she is aware of potential funding opportunities.											
He/she is able to identify the best funding opportunities for his/her business.											
He/she is able to create strategies to obtain funding.											
8 PITCHING YOUR BUSINESS AND CLOSURE											Mean score: ___
All business plan areas are clearly covered.											
He/she is able to present in a captivating and persuasive way.											
Thanks to the presentation the company and the product/service appear ready to launch.											

Further comments:

Source: Dr. Giulia Parola, ECSF

EMPLOYMENT PATH GRADING SHEET

NAME AND SURNAME

1= fully insufficient/fail 2= insufficient/fail 3= ver
unsatisfactory/fail 4= unsatisfactory/fail 5= alm

EVALUATION PREPARED BY

satisfactory/fail 6= satisfactory 7= very satisfactory

8= good 9= very good 10= excellent

MODULES	1	2	3	4	5	6	7	8	9	10
1 BUILDING CONNECTIONS & SELF-ASSESSESSING YOUR EMPLOYABILITY										Mean score: ___
He/she is able to identify key people that could support him/her in the pursuit of his/her goal.										
He/she is able to network and build good social relations in the field of interest.										
He/she is able to be self-critical.										
He/she is able to identify which skills he/she needs to develop.										
2 DEVELOPING YOUR PROFESSIONAL GOALS AND STRATEGY										Mean score: ___
He/she has a clear idea about his/her professional goals.										
He/she is able to act in stages by creating a step-by-step strategy and prioritizing goals.										
2 IDENTIFYING JOB OPPORTUNITIES AND CHANNELS										Mean score: ___
He/she is able to identify all channels that could lead to a job opportunity.										
He/she is able to prioritize among channels and knows how to use them.										
He/she is able to identify job opportunities of interest and avoid job scams.										
4 DEVELOPING YOUR PERSONAL BRAND AND JOB SEARCH PLAN										Mean score: ___
He/she is able to define him/her-self in terms of vision, values and purpose.										
He/she is able clearly explain how his/her compenticies contribute to his/her identity.										
He/she is able to create a structured job search plan.										
He/she is able to plan measurable goals and ways to evaluate the progress.										
He/she is able to meet dealines and manage time.										
5 BUILDING YOUR CV										Mean score: ___
He/she is able to structure his/her CV in an organized manner with a good visual design.										
He/she is able to be concisive and make relevant information stand out.										
He/she is able to tailor the CV according to thedifferent positions on offer.										
He/she is able to prepare a complete application (including cover letter).										
6 PREPARING YOUR JOB INTERVIEW										Mean score: ___
He/she is able to perform research on the company and role.										
He/she is able to align him/her-self with the job description.										
He/she is able to manage stress.										
He/she is able to answer clearly to common interview questions.										
He/she is able to follow up on the interview.										
7 PREPARING YOUR FIRST DAY AT WORK										Mean score: ___
He/she is able to introduce him/her-self briefly and clearly.										
He/she is able to gather information about the new employer and look prepared.										
He/she is able to be proactive by preparing questions or advance suggestions.										
He/she is able to befriend new colleagues.										
8 PITCHING YOURSELF AND CLOSURE										Mean score: ___
All relevant information (experience, education etc.) is clearly covered in the presetation.										
He/she is able to present him/her-self in a captivating and persuasive way.										
Thanks to the presentation he/she appears as an asset to any company that would hire him/her.										

Further comments:

Source: Dr. Giulia Parola, ECSF

To assess to mid-term outcomes we recommend to follow-up with a short survey one year and three years combined with focus group interviews after the intervention ended.

9.4.2 Form for mentees

1. On a scale from 1-10, how are you doing personally? (1=not good at all and 10=very good!)

natural number

2. On a scale from 1-10, how are is your business doing? (1=not good at all and 10=very good!)

natural number

3. Are you still trading?

a) Yes

b) No

4. Are you still in contact with your mentor?

a) Yes

b) No

5. Is there anything we can help you with, anything you would like to share with us?

Text field

9.4.3 Form for mentors

1. Looking back at your experience as a mentor. On a scale from 1-10, how likely is that you would volunteer as a mentor again? (1=not likely at all and 10=very likely!)

natural number

2. On a scale from 1-10, how useful do you think the mentoring programme was for your mentee? (1=not useful at all and 10=very useful!)

natural number

3. Are you still in contact with your mentee?

c) Yes

d) No

4. Is there anything we can help you with, anything you would like to share with us?

Text field

10 Conclusion and Recommendations

When launching a mentoring scheme we have found it extremely helpful to collaborate with organisations who have successfully designed and implemented a mentoring programme. Therefore we would like to encourage you to contact us in case you would like to learn more about our approach to mentoring. This guide can only offer an overview of mentoring processes and programme management. However, mentoring programmes need commitment from the organisation's leadership team and staff involved. In our experience, constant reflection and practice is the best way to improve a mentoring programme and the mentors.

Mentors and mentees need to be prepared for their role. We aim to support the dyads by providing an induction training and additional learning opportunities for mentors and mentees. Working with case studies and discussing challenges offers an opportunity to mutual learning and development in service of the mentees. The heart and soul of every mentoring programme is the mentoring programme coordinator. They build strong relations with mentors and mentees and are often the ones who identify potential challenges and areas of improvement. We would like to encourage you to keep in touch with your mentors regularly and ask them to share challenges they encounter with you, explore opportunities for learning and development and to keep them interested in mentoring.

Thank You!

We would like to thank **EEA Norway Grants** for creating a programme which allowed us to adjust and improve our mentoring services during a time of unprecedented challenges!

We would like to thank the following persons without their continuous support and expertise our mentoring programme would not be where it is today.

Prof. Dr. Bob Garvey, coachmentoring.co.uk

Jo Gray, Youth Business International

John Cull, YBI mentoring consultant

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Annex 1:

The induction and advanced mentoring modules have been piloted as online and offline learning formats. In an online learning environment we recommend to organize 3 induction trainings. In an offline, in-person environment the six modules can be combined. We recommend to adjust the learning opportunities to the actual needs of mentees and mentors.

Mentor Workshop – Induction

Induction

Agenda

- Introductions & Agenda

- Who is …?

- Who are our mentees?

- Our mentoring approach

- Roles and responsibilities in mentoring

- Processes in mentoring: Garvey's 3-phase model

- Matching

- Values: Exercise

- Techniques: An overview

- What next?

- Questions and answers

Introductions

- Division into groups of 2
- Time: 8 min (4 min per person)
- Afterwards, each person briefly introduces her/his interlocutor in 30 sec.

Guiding questions:
- Who are you?
- What do you do?
- Have you worked with a mentee before?
- What are your expectations of today's workshop?

Who are...

Who are we?

- Name of organisation
- Name of trainers delivering the workshop
- Experience in mentoring

Objectives and scope of organisation

- Date of registration
- # of employees
- Objectives, mission
- # of hours of support delivered per year
- Regional coverage

Who are our mentees?

- Entrepreneurs from the region
- Either currently in the start-up process or active for less than 3 years.
- Age: 20-35 years
- Predominantly busineses in services

Typical topics:

- Development of a sustainable business model
- Strategy, entrepreneurial orientation
- Development as an entrepreneur
- Development as a person
- Acquisition of customers; marketing & sales

What our mentees wish for

- "Decision-making and reflection aid".

- "Impulse giver who discusses visions and goals and does not immediately label everything as impossible"

- "Someone who deals with our problems and finds the company exciting"

- "A contact person who shares their experiences and passes on tips"

- "I hope the mentor can also help me grow on a personal level"

- "New perspectives and someone I can rely on"

Our approach to mentoring

"**Mentoring** is a learning relationship between two people. It requires trust, commitment and emotional connection. It involves listening, questioning, challenging and supporting. Mentoring has a time frame."

Prof. Bob Garvey

- Mentoring works best in a phase of transition.
- In mentoring, the mentee's agenda always comes first

Typically, three topics are worked on:

- Mentee's business
- Personal development
- Relationship between mentee and mentor
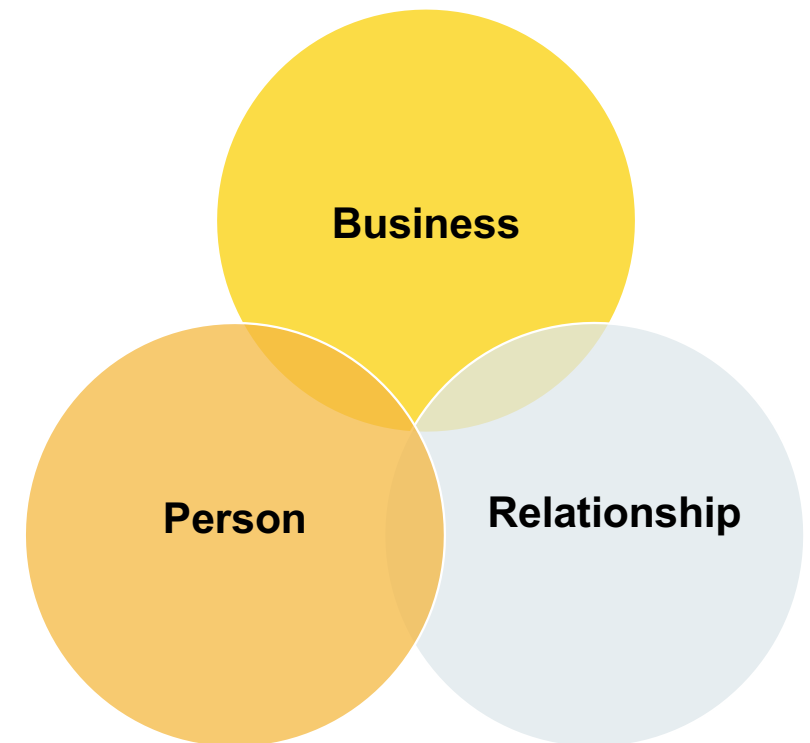
Roles and Responsibilities

Mentee:

- Drives the agenda
- Responsible for progress
- Responsible for the relationship

Mentor:

- Responsible for the process
- Responsible for the relationship
- Use of appropriate techniques and processes

Mentoring Manager:

- Ongoing support for mentors and mentees
- Selection and matching
- Monitoring and evaluation
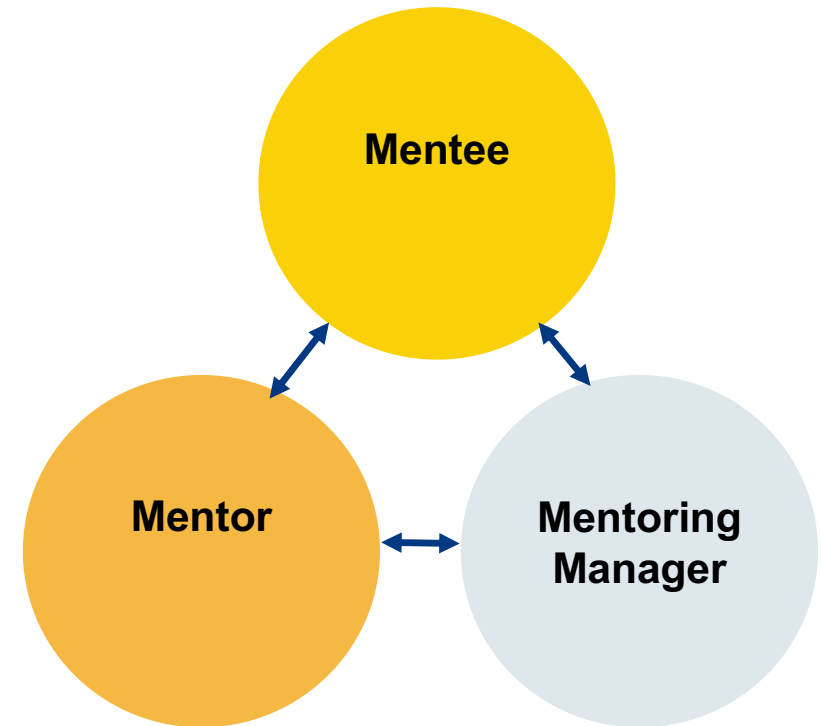
3-Stage-Model (B. Garvey)

Mentoring involves a number of processes. Different mentors have different strengths and work in different ways. Regardless of which approach or style you use, you might want to work within a framework to offer the mentee the most help possible.
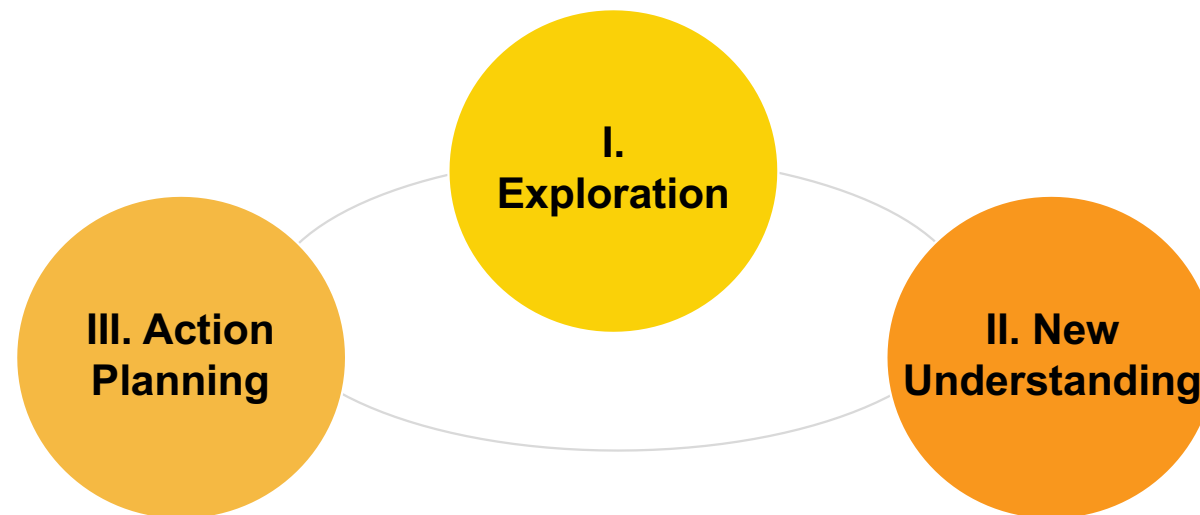
3-Stage-Model (B. Garvey)

»The model can be used in different ways:

- To think about what mentoring involves and to assess yourself as a mentor.

- As a timetable for a meeting to work through the phases

- As a map of the mentoring process - to see what points have already been covered and what still needs to be addressed

- To review the mentoring relationship over time as the mentee moves towards achieving the goals set at the beginning of the relationship

- To improve the shared understanding of the mentoring process and the mentoring relationship, and to develop the mentee's ability to apply the model independently.«

Garvey, B. (1998:31)

I. Exploration

III. Action Planning

II. New Understanding
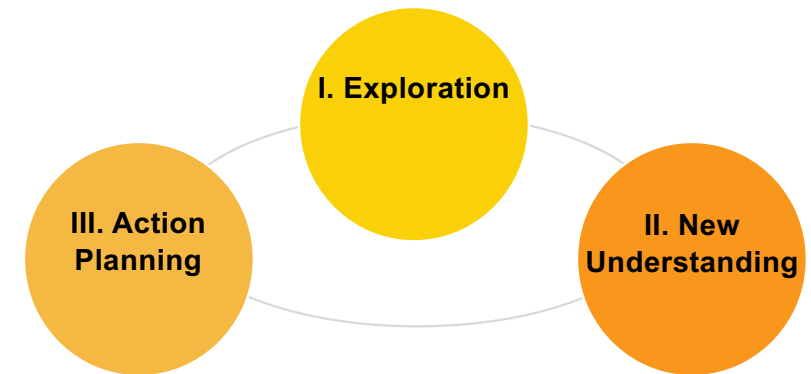
Matching

Relevant matching criteria are whether the mentor's experience fits the mentee's needs. Our criteria are:

- Shared values and beliefs
- Availability
- Learning styles
- Skills/experience
- Location
- Entrepreneurial experience
- Sector specific knowledge
- Experience edge
- Interests

- Matching is not an exact science, but uses information that the mentor and mentee provide, for example, in their profiles, in the interview and in workshops.
- The more similarities mentor and mentee have, the easier it is to establish a good working alliance and build trust.
- The greater the differences, the more opportunities there are to learn from each other.

| Mentor Workshop | Profile Interview | Matching | 1st Meeting | Mentoring/ Monitoring | Exit |

Exercise: Values

Select 10 values from the list that are particularly important to you - as behavioural guidance or as elements of a positive way of life.

Add your own values to this list as you wish.

Time allowed: 7'

Values & Principles

- adventure
- working on my own
- help other people
- recognition
- working with others
- working under pressure
- working peacefully
- excitement
- professional development
- democracy
- service for the public
- effectiveness
- honesty
- fast-paced life
- influence on others
- commitment
- close relationships

- determination
- ethical behaviour
- expert knowledge
- family
- helping others
- friendship
- cheerfulness
- challenges
- inner harmony
- integrity
- intellectual status
- competence
- controlling others
- cooperation
- physical challenges
- creativity
- art
- performance

- nature
- rules/order
- personal development
- exploiting own potential
- quality of things
- participate in leadership
- money
- community
- quality relationships
- wealth
- purity
- religion
- fame
- self-respect
- safety
- exiting work
- love & affection
- power & authority

- top performance
- stability
- status
- spirituality
- spontaneity
- meaning of life
- environmental awareness
- independence
- responsibility
- financial security
- visions
- diversity & change
- growth
- wisdom
- truth
- ...

Techniques

Questions & Listening:

- Dialogic Choices (Garvey)

- Thinking Partner (Kline)

- Working with narratives

Decision making

- SWAT

- Rose-Bud-Thornes

- Effectuation process

- Scaling

Dealing with dncertainty and concerns

- Controlling the Controlables (Covey)

- Effectuation: Crazy Quilt, Lemonade principles

- **Values and Principles, mind-set**

- 3P-Model

- Pilot-in-the-Plane principle

- SWAT

- Rose-Bud-Thornes

- **Strategy, Marketing & Sales**

- Effectuation Process

- Business Model Canvas (Osterwalder)

- Story Board

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Mentoring
Workshop 2 for Mentors

Agenda

- Approach to Mentoring

- Processes in mentoring: Garvey's 3-Stage Model

- Variations of the 3-Stage model

- Ground Rules - Dimensions

- Questions and answers

Opening Question

What do you do to make sure you keep well?

Approach to Mentoring

- "**Mentoring** is a learning relationship between two people. It requires trust, commitment and emotional engagement. It involves listening, questioning, challenge and support. It has a time scale." *Prof. Bob Garvey*

- **»Mentees are the experts for their life and their business.«**

- *Mentoring works best when the mentee is in phase of transition. For entrepreneurs that means mentoring is part of the post-start-up support. Mentoring can be an addition to existing training/coaching programmes or a stand-alone solution.*

- Mentoring usually involves working on three levels: The mentee's business, personal development and the relationship between mentee and mentor

Mentee's Business

Person

Relationship
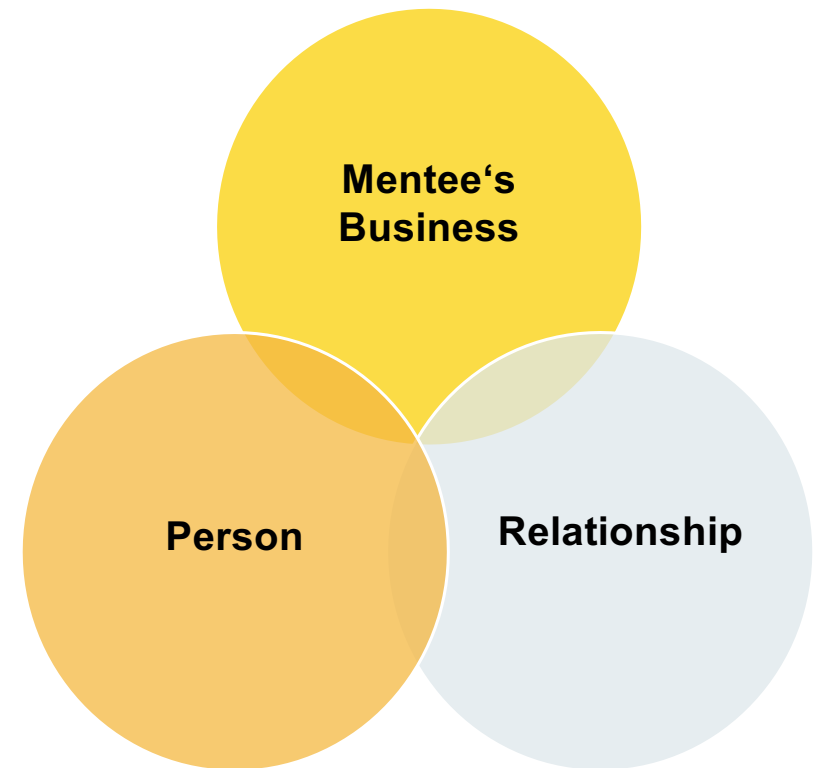
Experiential Learning

Development takes place primarily through **reflection** and application in **practice**!

Concrete Experience

Test implications in new situations

Observation Reflection

Concepts Generalizations
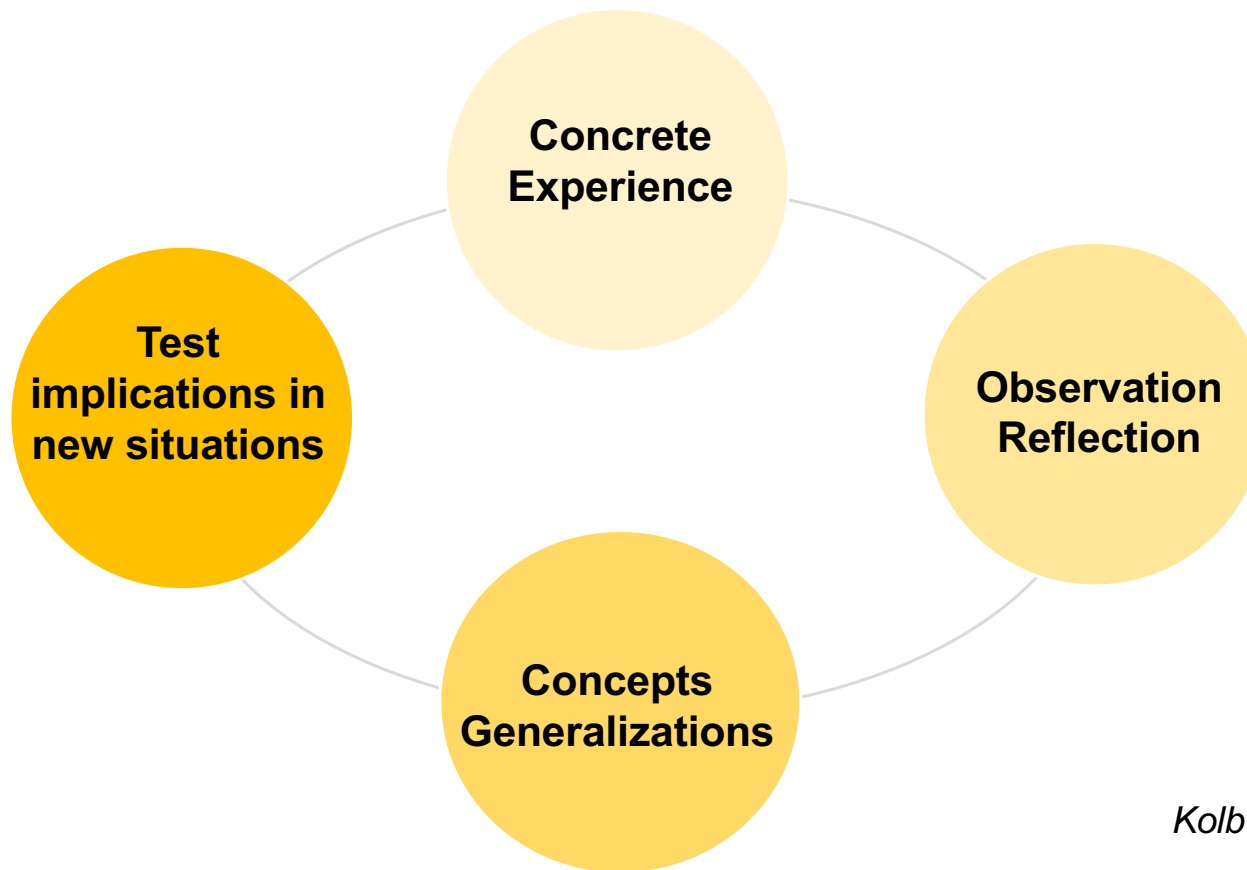
Kolb's Learning Cycle (1984)

3-Stage-Model (B. Garvey)

Mentoring involves a number of processes. Different mentors have different strengths and work in different ways. Regardless of which approach or style you use, it makes sense to work within a process framework to offer the mentee an opportunity to make the most of the sessions.
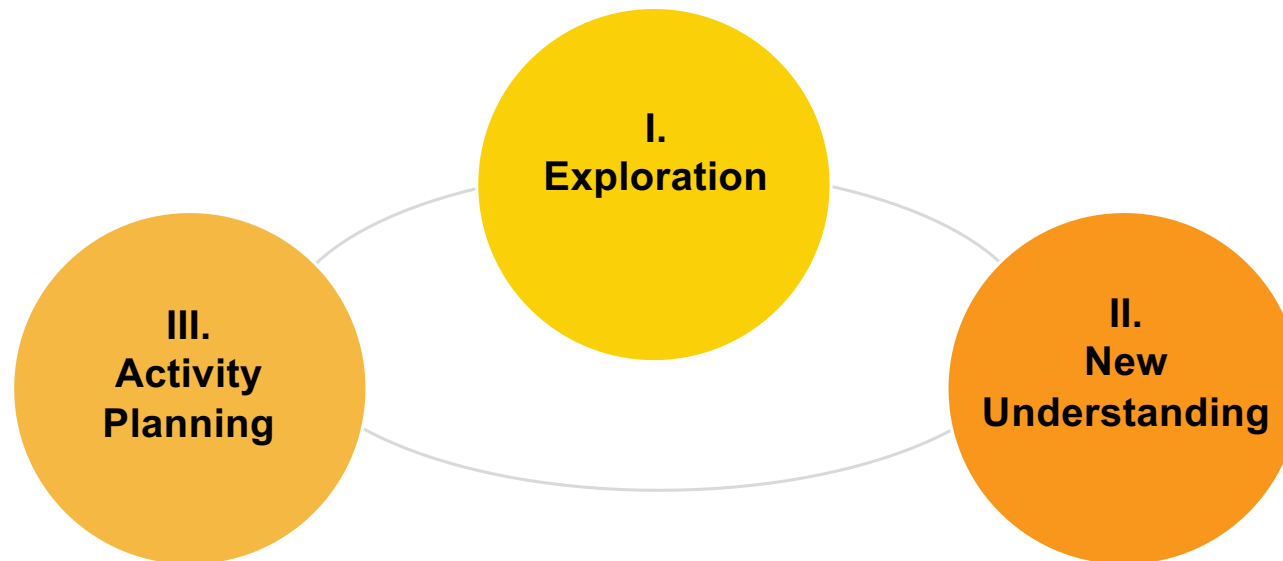
I.
Exploration

III.
Activity
Planning

II.
New
Understanding

Exercice

Breakout session:

– In groups of 2:

– 1 person takes on the role of mentor,

– 1 person takes on the role of mentee

Suggested topics:

– What is going through your mind right now?

– How can you apply the 3-step model?

– Time : 15'

3-Stage-Model (G. Egan)

Guiding questions

I. What happened, what is the story?

II. What really happened? Who confirmed the story?

III: What would be the preferred story? What can you do differently/better next time?
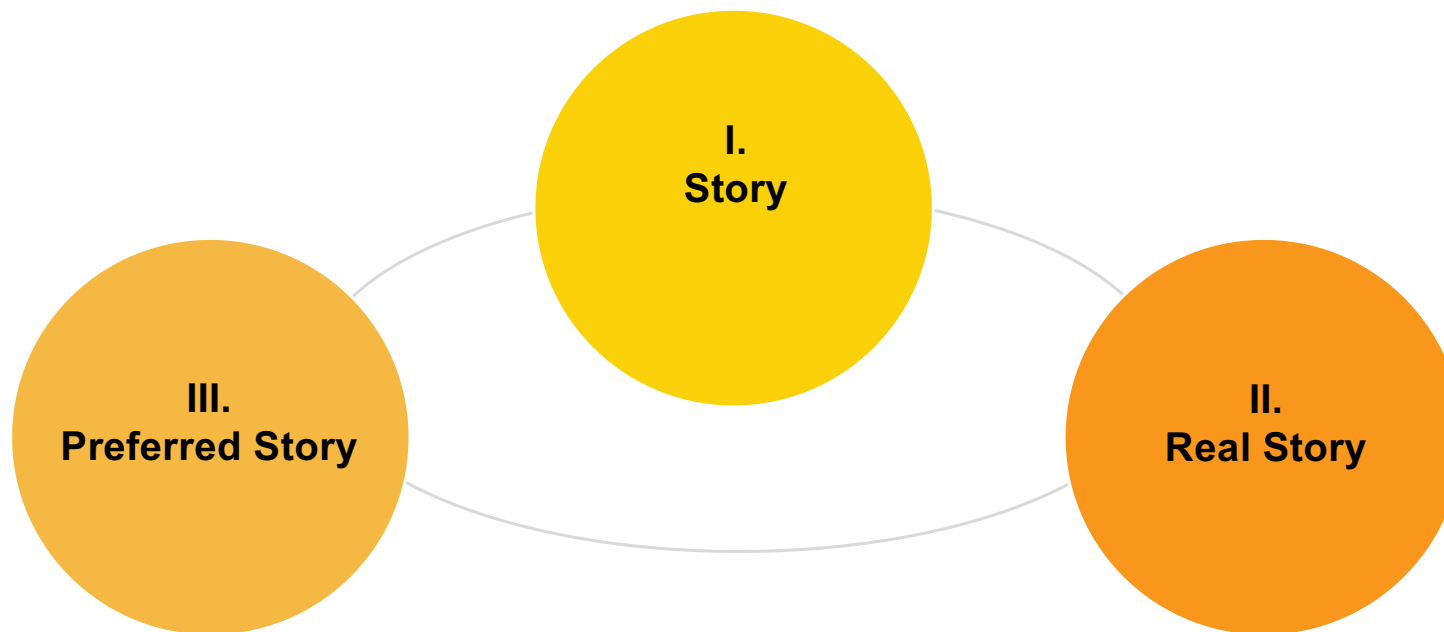
3-Stage-Model (M. Pegg)

Guiding questions

I.   What is the concern/topic and the mandate? What is to be achieved in the mentoring session?

II.   What solutions are conceivable? What could be done differently right now?

III.   What are the next, concrete steps?
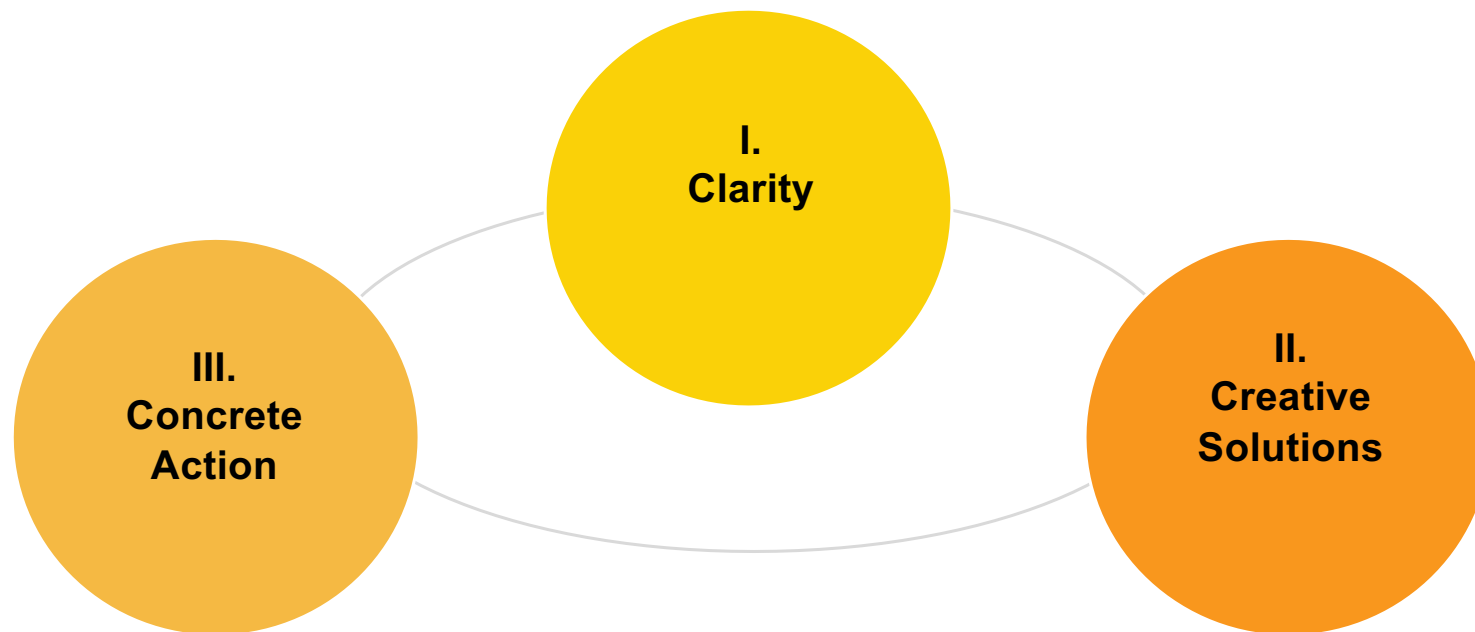
Ground Rules: Dimensionen (B. Garvey)

OPEN	– – – – – ▬ – – – –	**CLOSED**
PUBLIC	– – – – ▬ – – – – –	**PRIVATE**
FORMAL	– – – – ▬ – – – –	**INFORMAL**
ACTIVE	– – – – ▬ – – – –	**PASSIVE**
STABLE	– – – – ▬ – – – –	**UNSTABLE**
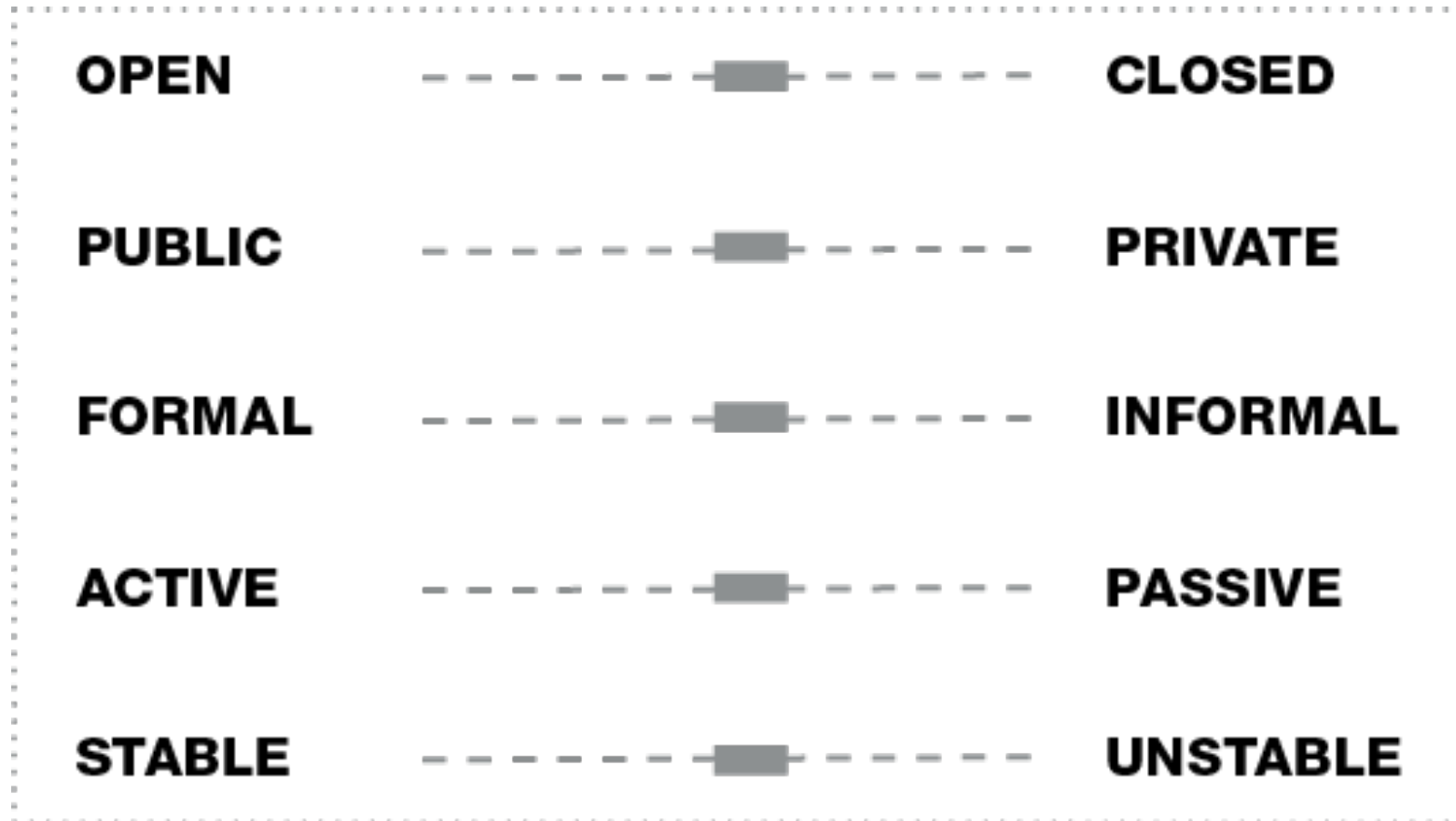
Garvey, Bob (1994: 18)

References and suggested reading

Alred, G. and Garvey, B. (2019) *Mentoring*. La Vergne: Management Pocketbooks (Management Pocketbooks).

Egan, G. (2018) *The skilled helper : a client-centred approach*. 2nd edition. EMEA edition. Australia: Cengage.

Garvey, B. (1994) "A Dose of Mentoring," *Education & Training,* 36(4), pp. 18–26.

Garvey, B., Stokes, P. (2022) *Coaching and Mentoring : theory and practice*. 4th edition. London: SAGE.

Kolb, D. A. (2015) *Experiential learning : experience as the source of learning and development*. Second edn. Upper Saddle River, New Jersey: Pearson Education.

Pegg, M. (2020) *The Positive's Encouragers Book: The art of encouraging people during our time on the planet*. UK: The Strengths Organisation Ltd. Available from: <https://www.thepositiveencourager.global/the-positive-encouragers-book />

Mentoring
Workshop 3 for Mentors

Listenig & Questions

Agenda

- Listening: A Story

- Thinking Partner Model (Nancy Kline)

- Dialogic Choices (Bob Garvey)

- Ground Rules - Dimensions

- Questions and answers

Opening Question

What is going through your mind right now, what is on top?

LISTENING TO UNDERSTAND

A Story: **Cash Register**

- I read out a short story.

- Then I ask questions and you evaluate whether the answer:

    - True,

    - False or

    - Unknown.

- Discuss your answers in the group.

LISTENING TO UNDERSTAND

A Story: **Cash Register**

A salesperson has just turned on the lights in a shoe store when a man appears asking for money. The owner opens a cash register. The contents of the cash register has been removed and the man runs. The police is immediately notified.

LISTENING TO UNDERSTAND

STATEMENTS ABOUT THE STORY: True (T) - False (F) – Unknown (U)

1) The man appeared as soon as the owner turned on the lights in his shoe store ...

2) The thief was a man ...

3) The man didn't ask for money ...

4) The man who opened the cash register was the owner ...

5) The shoe store owner removed the contents from the cash register and ran away ...

6) Someone opened a cash register ...

7) After the man who asked for the money picked up the contents of the cash register, he ran away ...

Instructions: Please answer the following questions and indicate if the statements are true – false – unknown. Try to come to an agreement with the other persons in your group. Appoint a facilitator, ensure everyone gets equal time, stick to the exercise brief, sum up the key learning points, report back in plenary, enjoy!

We will share the statements in the chat box. Please open the chat when you are in your group. Time: **Time:** 7 minutes!

LISTENING TO UNDERSTAND

Solution: Statement 3) is false, statement 6) is true and all others are unknown.

WHAT HAPPENED?

− We filter information.

− We interpret information based on experience, beliefs.

− We can only process information in small quantities.

TIP:

Do not think about what you want to say next. Follow up with a question. Example:

Person 1: I want to learn Spanish.

Person 2: What motivates you to learn Spanish?

Thinking Partner (Nancy Kline)

Assumptions of the Time To Think model

− Our thinking depends on the quality of our attention for each other

− Mentees are generally capable of sorting out the vast majority of their own issues

− The mind works best in the presence of questions

LISTENING: WHAT DOES IT MEAN IN PRACTICE?

- Pay "beautiful attention" to the thinker

- Avoid any sounds, half-words – be silent

- Keep eye contact

- Smile occasionally

- Be interested and be at ease

- Don't even think about interrupting!

- Don't ask picky clarifying or confirming questions

- When your partner has nothing more to say, ask:

'What else do you think, feel, want to say about this?'

- If the thinker becomes quiet, but their eyes are alive, relax and stay quiet: they're thinking

– Embrace silence, this where the thinking is happening

LISTENING: BREAKOUT SESSION

- Groups of 2

- Person A: Mentor (Thinking Partner)

- Person B: Mentee (Thinker)

- After 5 minutes change roles

- 1st question: What do you want to think about?

- 2nd question: What more do you think or feel or want to say about this?

- 3rd question: What else?

- Remember: If the thinker becomes quiet, but their eyes are alive, relax and stay quiet: they're thinking

- Enjoy!

LISTENING: Reflective Practice

- WHY IS **LISTENING** SO HARD?

- WHY IS **THINKING** SO HARD?

Questions

- A question can be a **starter**

- A question is an **invitation**

- If we always ask the same type of questions, we will have the same type of conversation

- Asking a question from a different place can change the nature of the conversation and open new perspectives

Dialogic Choices (B. Garvey)

Garvey and Stokes (2022: 117)

Dialogic Choices (B. Garvey)

Formulate a questions for each of the six areas:

Social, technical, tactical, strategic, self-insight, behavioural.

Instructions:

- Ensure everyone gets equal time
- Stick to the exercise brief
- Take notes and sum up the key learning points, be prepared to type your suggestions into the chat box!
- Report back in plenary
- Enjoy!

Time: 10'

Exercice

Breakout session:

− In groups of 2:

− 1 person takes on the role of mentor,

− 1 person takes on the role of mentee

Suggested topics:

− What is going through your mind right now?

− How can you apply the 3-step model?

− Time : 15'

Q&A

QUESTIONS, SUGGESTIONS, COMMENTS?

References and Suggested Reading

Garvey, B., Stokes, P. (2022) *Coaching and Mentoring : theory and practice*. 4th edition. London: SAGE.

Kline, N. (1999*) Time to think: listening to ignite the human mind*. London: Ward Lock.

Kline, N. (2020) *The Promise That Changes Everything: I Won't Interrupt You*. London: Penguin

Mentoring
Workshop 4 for Mentors

Effectuation

27.05.2022

Agenda

- Effectuation logic

- Effectuation process

- Effectuation principles and examples

- Questions and answers

Opening Question

How do you deal with uncertainty and planning insecurity?

Effectuation Logic

"Causal processes focus on the predictable aspects of an uncertain future. The logic for using causal processes is: to the extent that we can predict the future, we can control it.

Effectuation, on the other hand, focuses on the controllable aspects of an unpredictable future. The logic for using Effectuation processes is: to the extent that we can control the future, we don't need to predict it."

Saras Sarasvathy (2001)

Effectuation Process
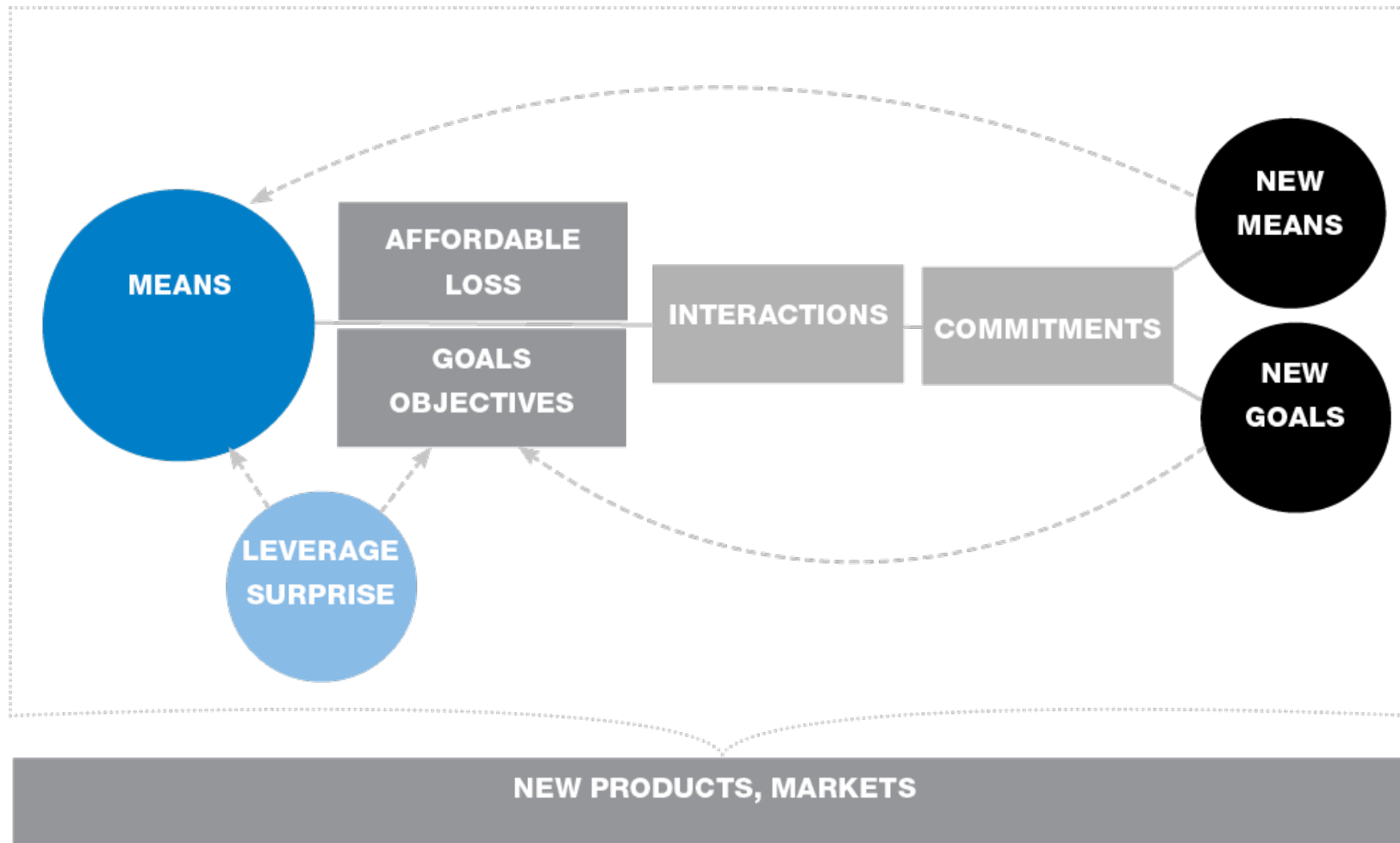
adopted from www.effectuation.org

Effectuation Principles

- **Bird-in-Hand:** We work with what we have available now (knowledge, money, ability, contacts).

- **Affordable Loss:** We determine an amount of money that we can use now to achieve the desired results. This may mean pursuing other activities to come up with the necessary amount of money.

- **Crazy Quilt:** Building my own professional network. It's about new contacts and commitments from potential clients and business partners.

- **Lemonade:** We know that something unexpected can happen, we expect it.

- **Pilot-in-the-plane:** The responsibility for my development and entrepreneurial results lies with me. If I don't push it, no one else will.

Bird-in-Hand

WHO AM I?

What are my values and beliefs? What are my passions? What role do I think I should play in society? What value do I want to create in the future? What is important to me?

WHAT DO I KNOW?

What are my core activities? What do I have superior knowledge about? What do I consider to be my core competencies? What assets do I possess?

WHO DO I KNOW?

Who do I consider as network partners with whom I can jointly develop new business models? Who do I consider as customers?

Bird-in-Hand: Mind-Map

WHO AM I?

What are my values and beliefs?
What are my passions?
What do I think should be my role in society?
What value do I want to create in the future?
What matters to me?

WHAT DO I KNOW?

What are my core activities?
In what areas do I have superior knowledge?
What do I consider my core competences?
What assets do I own?

my ambition /// mission /// purpose

WHO DO I KNOW?

Who do I consider network partners with whom I can co-create new business models with?
Who do I consider to be our most demanding clients?
Who do I know who can help me in areas I don't know that well?
Who can provide feedback on new ideas?
Who can help me identifying new opportunities?

WHAT DO I HAVE?

How much money do I have to invest in a business?
What equipment and space do I have available?

Crazy Quilt

At a very early stage, start contacting other people and invite them as partners or clients.

Add to the list "Who do I know?" People who:

- can help develop a better understanding of markets and customer needs

- can help develop new ideas

- can tell who they need to know and who does what

- are able to pave the way and put you in touch with people who can help you

- give constructive feedback, challenge decisions and ways of thinking

- strengthen determination in difficult times and give you a sense of purpose

Qrazy Quilt: Example

Number of Interactions	Channel	Comment
10 people who work in the marketing sector	linkedIn	Explore new possibilities Explore how I can use this channel to generate awareness Ask for feedback Try to talk to them directly (explore how to make contact)
5 former/potential customers	Email	Explore what they do Ask: How can I help?
5 former/potential customers	Call	Explore what they do Ask: How can I help?

Affordable Loss

- Can I afford (financially) what I would invest in this idea?

- Am I aware of the possible negative impact that a disaster would have on my current business image?

- How much time of my life would I be willing to invest to make this idea work?

- How could I reduce the potential risk I am taking and still move forward?

TIP: Speed before precision!

- A breakdown of expected income, accounts receivable versus current expenses (business and personal) for the next 3-6 months is sufficient.

- Result: financial runway - it is clear how much money is available for the next 3-6 months for the project.

- If there is not enough money available, the question is: What can I do **now** to **earn** money?

Q&A

QUESTIONS, SUGGESTIONS, COMMENTS?

References and Suggested Reading

Sarasvathy, S. D. (2001) 'Causation and Effectuation: toward a Theoretical Shift from Economic Inevitability to Entrepreneurial Contingency', *Academy of Management Review*, 26(2), pp. 243–263

Sarasvathy, S. D. (2008) *Effectuation : elements of entrepreneurial expertise*. Cheltenham, Glos, UK: Edward Elgar (New horizons in entrepreneurship).

Links:
https://effectuation.org/the-five-principles-of-effectuation

Mentoring
Workshop 6 for Mentors

Change & Transition

Agenda

– Behaviour under stress

– Kübler-Ross: change curve

– Bridges' Model of change

– Questions and answers

Opening Question

When do change processes become easier, when do they become more difficult?

TYPICAL BEHAVIOUR IN STRESS SITUATIONS

Our behaviour in stress situations varies between two extremes:

Complaining
Blaming
Paralysis

Solutions
Creativity (new ideas)
Epiphany
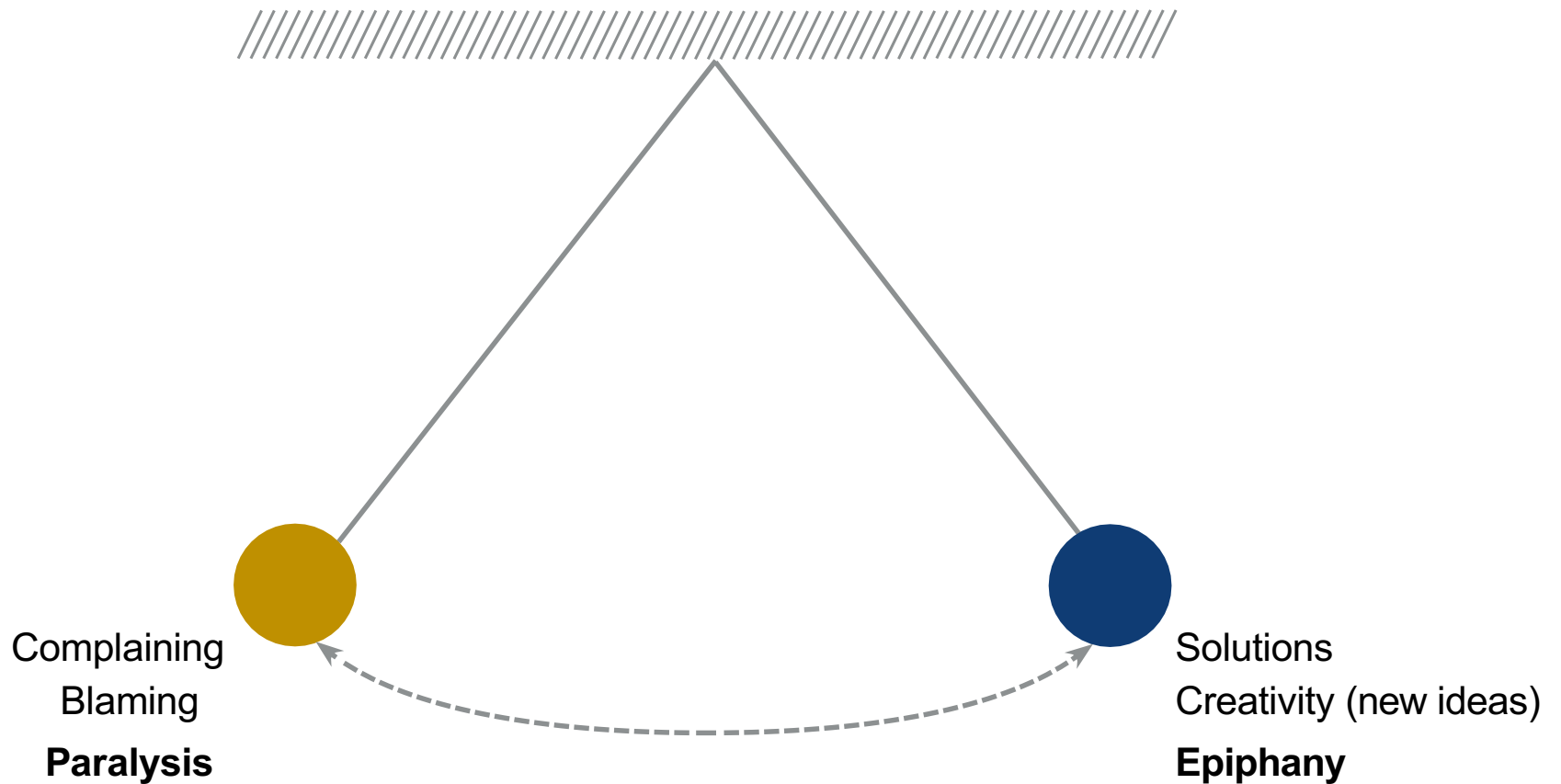
TYPICAL BEHAVIOUR IN STRESS SITUATIONS

and how to deal with it...
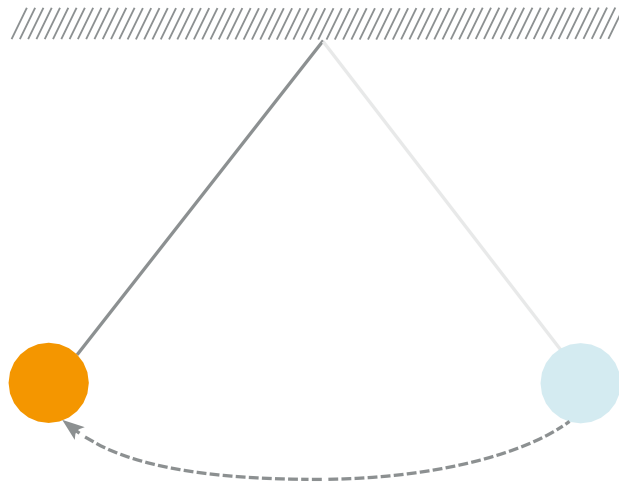
Show undertsanding and empathy. Be present.

– I understand that this situation must be
   very difficult for you.
– I hear you.
– What would help you now?
– Who could help?
– How are you taking care of yourself?
– What would be good for you now?
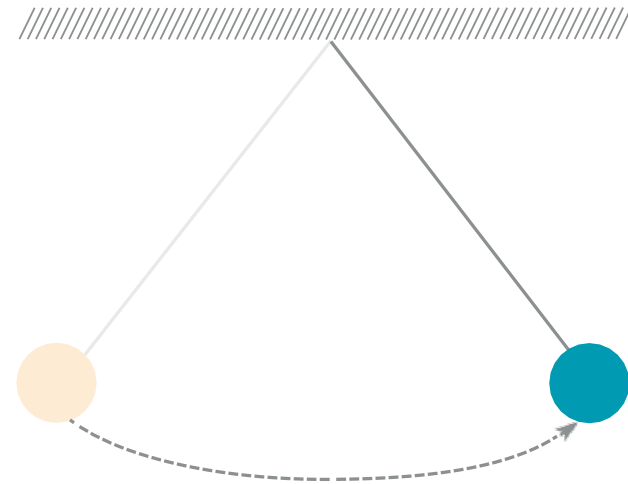
Support developing ideas and makeing
good choices.

– That sounds really good!
– What do you see as future possibilities?
– What can you control (vs. not control) in
   your life?
– What will you start doing, stop doing,
   continue doing?
– What can you do better?

Change Process (Kübler-Ross)
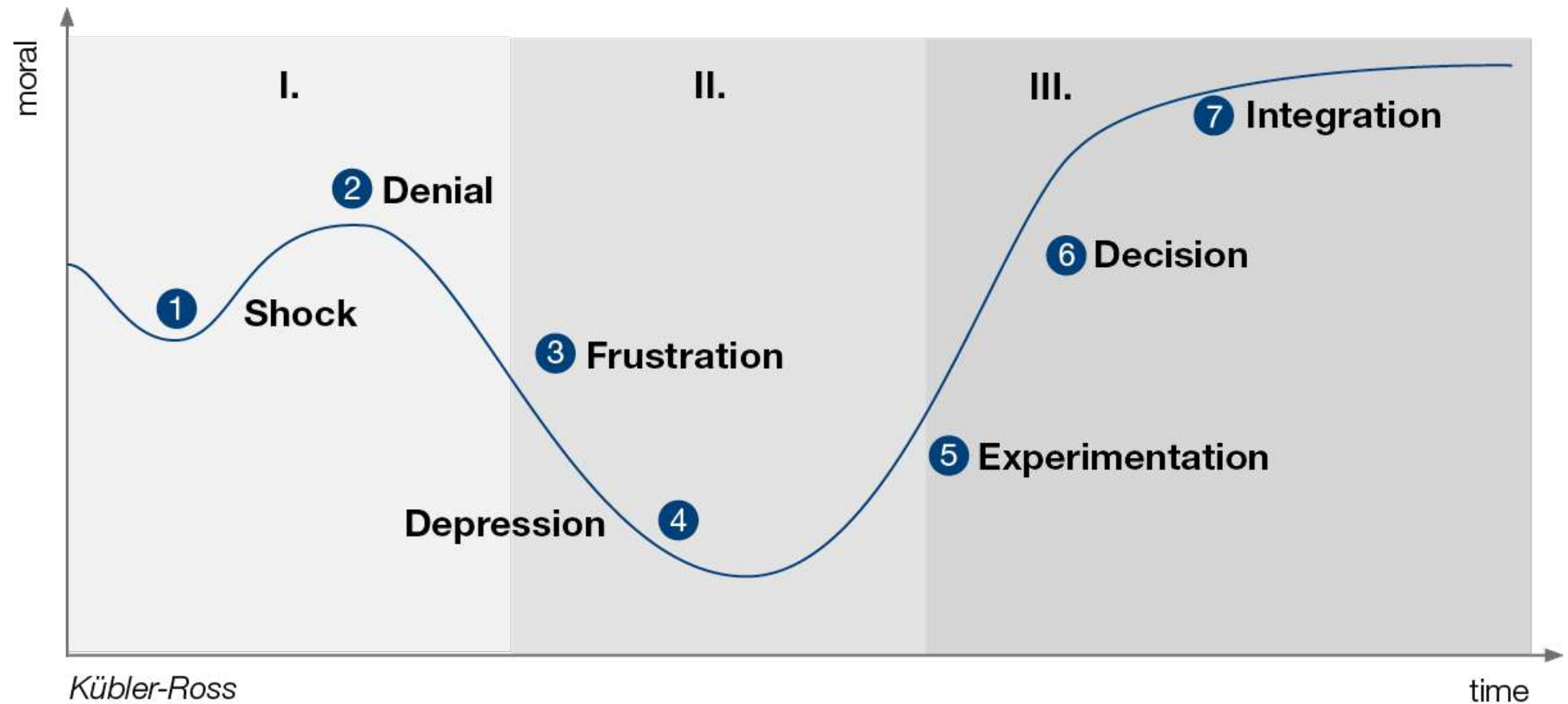
Dealing with Change & Transition

Phase 1: needs information, confirmation: it will happen

Guiding questions: What can be expected? How could one adapt? Who can help? Why is it important to change?

Tip: Build trust and give positive feedback

Phase 2: needs listening, don't suppress conflicts, empathy.

Themes: Acknowledge feelings. Respond to concerns. Remind of the new reality. Encourage individual and group discussions. Anticipate declining performance and help think of ways to improve. Discuss what can be controlled and focus on those things.

Phase 3: Prioritise and focus attention, brainstorm, follow up.

Topics: Help to plan and set goals. Encourag learning from experience. Praising and encouraging. Using creative thinking processes to encourage ideas. Understanding the inevitability of mistakes.

Bridges' Model of Change

Endings,
Loss,
Letting go

Neutral Zone

The New,
New beginnings

time
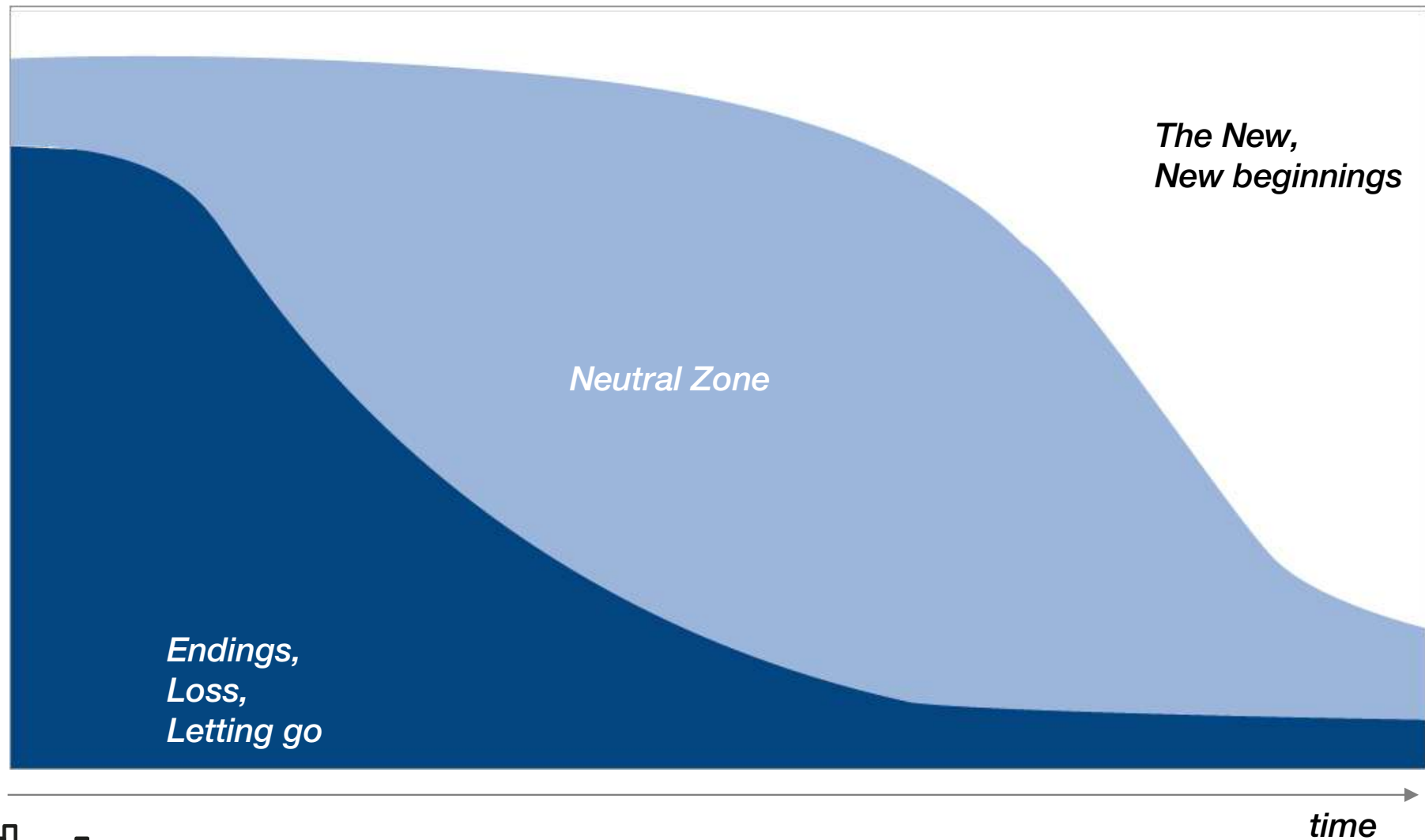
Dealing with Change

Letting go:

Of roles. Way of doing things. Relationships. Identities. Skills.

Neutral zone:

Hanging between 2 places: between was and will. Like having a parachute before it opens - colourful metaphors are often used. Strong and mixed feelings. Fluctuating motivation and performance. Find footing.

New beginnings:

Opportunities are recognised. Energy and excitement. Commitment. Focus on results. Bringing things to life. Freeing oneself from old ballast.

Breakout Session

What change process have you experienced yourselves?

What helped you to get through this process of change?

Instructions:

– Groups of 4-5

– Ensure everyone gets equal time

– Stick to the exercise brief

– Take notes and sum up the key learning points, be prepared to type your suggestions into the chat box!

– Report back in plenary

– Enjoy!

Time: 15'

Q&A

QUESTIONS, SUGGESTIONS, COMMENTS?

References and Suggested Reading

Garvey, B., Stokes, P. (2022) *Coaching and mentoring : theory and practice.* 4th edition. London: SAGE.

Pfund C. et al. (2021) "Reassess-Realign-Reimagine: A Guide for Mentors Pivoting to Remote Research Mentoring," *CBE life sciences education,* 20(1), p. 2

Links:
https://wmbridges.com/about/what-is-transition/

More information: YES! Thinking Space

https://youngentrepreneurssucceed.com/thinking-space/

Annex 2:

The case study series is meant to offer ideas how to use case studies in a learning environment which allows mentors to reflect about their practice, address issues they may encounter and to connect with other mentors. We strongly encourage you to use your own case studies. It will feel closer to reality and to your social context in which mentoring takes place.

Case Studies Series
Workshop 1 for Mentors

Ethics, Power Dynamics & Multiple Agendas

Agenda

– Introduction: Why this series? Intention, process

– Case Study from Spain

– Reflective practice – breakout session 1

– Influences on the coaching and mentoring space

– Ethical perspectives – self-awareness, bias, power

– Navigating various agendas in C&M assignments: Whose agenda is being played out?

– Power dynamics

– Strategies: Exit – Voice – Loyalty

– Discussion, conclusion

– What's next?

Why this series?

Intention:

– Create a space to discuss, learn and share from real cases

– Explore different ideas to address challenging situations in mentoring

– Think of learning as a social activity

– Make use of reflective processes

– This series is based on real cases and experience from Spain, Italy and Greece

– We asked coaches and mentors to share "difficult" situations

– Process: identify themes which occurred regularly and in all countries and with different target audiences (i.e. women, migrants/refugees, rural and urban areas)

– Develop a better understanding of what's going on to find a way forward (reflective process)

– **Invitation:** join a community of discovery!

Reflective Process

1. **What happened?** What struck you? What did you notice, think, feel?

2. **So what?** What seems to be relevant? Why does it matter?

3. **Now what?** What might impact, influence the mentoring space? What might be a good way forward?
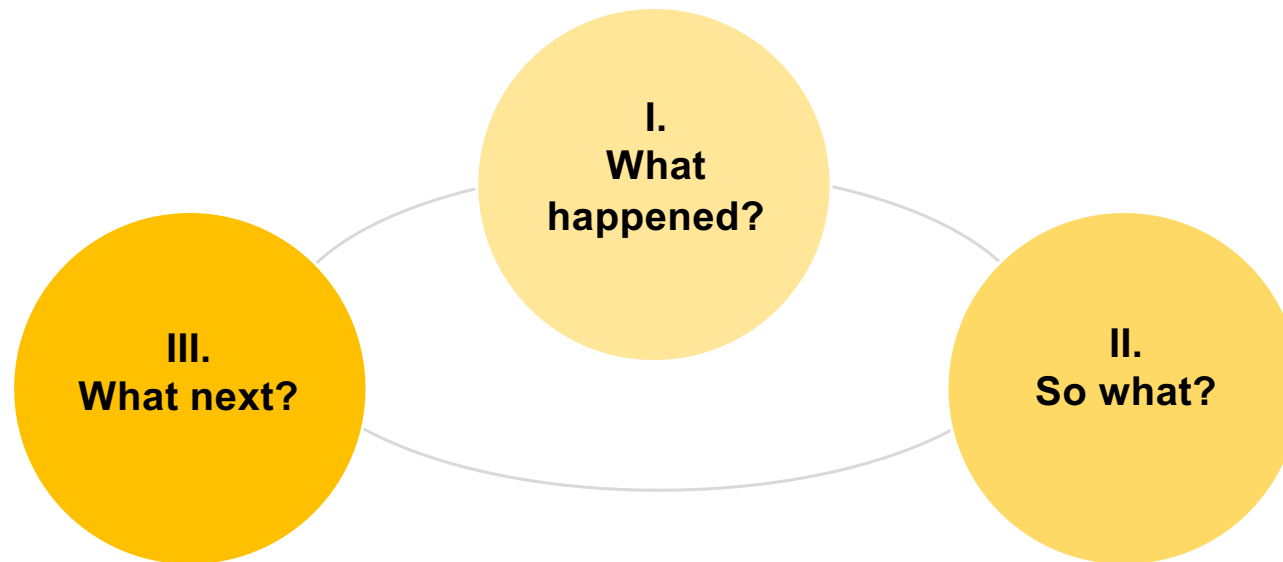
Adapted from: Alred, G. and Garvey, B. (2019)

Meet Alfonso – A Case Study from Spain

Alfonso (28) lives in a small town on the coast some 60 km away from of the next big city. He still depends on his family. He does not own a car and public transport is very limited. He attended school to comply with the minimum requirements but other than that he has no relevant additional education and work experience. His family network pushed him to resume his studies and asked him to do something about his education/life.

Alfonso registered for a Certificate of Professionalism in Administrative Management, which combines training and coaching. The course contains 800h of training over a period of ten month, 80h of internship with external employers and one hour of coaching weekly. The coaching programme aims to improve the employability of the coachee.

Hehas been identified as a someone without personal or professional motivations, with unhealthy lifestyle habits and no long-term goals. Unhealthy lifestyle habits, in this context, can refer to poor personal hygiene, unhealthy diets and zero physical activity. A difficult family background can refer to low financial resources and other socio-economic issues. Alfonso attends the training and mentoring sessions regularly. During the sessions he agrees to complete tasks. However, in between the sessions he seems to change his mind regularly. Goals and objectives discussed and agreed on in previous sessions seem to have changed. The mentor is stuck. He thinks about using a different approach which might be time consuming and is not in line with the overall objectives of the programme.

Reflective Practice

– Groups of 3 – 4 people

– Share your name, where you are from, what you would like to take away from today's session

– Assign someone to share in plenary

– Time: 15'

1. **What happened?** What struck you? What did you notice, think, feel?

2. **So what?** What seems to be relevant? Why does it matter?

3. **Now what?** What might impact, influence the mentoring space? What might be a good way forward?

Alternative questions

– What is the purpose of the training and mentoring programme?

– How would you describe Alfonso's behaviour?

– What could be Alfonso's motivation to sign-up for the certificate course?

– Do you notice any red flags for you?

– What, in your opinion, seems to be the role of the coach?
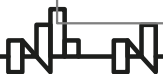
Influences on the Mentoring Space

- Across Spain, some 19.5% of young people between the age of 15-29 are considered to be NEET (**N**ot in **E**ducation **E**mployment or **T**raining)

- Real threat for a significant number of being excluded long-term from the labour market

- Programmes tend to focus on re-engagement with the labour market

- Policy recommendations (OECD, ILO): up-skilling, adopt new values and principles to become employable

- Assumption: social integration follows labour market integration

- Access to funding: support organisations have to comply with such objectives set-out in calls for proposals

So what?

Ethical Principles

1. **A Kantian perspective:** For Kant the **autonomy** and free will of the individual is important. Kant differentiates between **hypothetical imperatives** and **categorical imperatives**. Hypothetical imperatives could refer to a coachee's desire to earn money, therefore they should get a job. Categorical imperatives could refer to a coachee's question what action would serve a greater purpose for the benefit of a wider community but also for themselves. Kant suggests to treat human beings as an end in itself, not as a means to an end.

2. **A consequentialist/utilitarianist perspective:** Consequentialism/utilitarianism is concerned with the **effects** or outcomes **of an action**. It could be argued that a coachee has the moral obligation to find a job so that they would contribute to the benefit of a wider community. A moral obligation could be to reduce public spending. A consequentialist/utilitarianist perspective would see human beings as a means to an end.

Ethical Principles

3. **A duty/ethics of care perspective:** At some point in our lives, we all depend on others. A young child depends on their parents, elderly people might depend on younger ones. Ethics of care recognizes that human beings depend on others. In developing the relations of caring we enable human beings to live and to progress. For coaches/mentors this could refer to a duty of care for their coachees/mentees. But it would also refer to a duty **of care for themselves**. We could therefore argue that programmes to support disadvantage audiences is a moral obligation for a community or a society.

    This perspective also raises the question: **Who can we leave behind?**

Points for Reflection

1. When you think of these three ethical perspectives: in general, do you prioritize one over the other?

2. In your opinion: How would you justify an obligation to comply with employer's values? How would you justify an obligation for Alfonso to let go of his autonomy and moral right to live a self-determined life? Make use of different ethical principles!

3. If you were Alfonso's mentor, how would you describe your role? What is your obligation as a mentor? Discuss, considering different ethical principles from different perspectives!

4. How might ethical thinking inform your practice? Does it matter? What could you do differently?

- Feel free to discuss one question or all of them.
- Alternative: Discuss other ethical principles which are relevant for you.

Power Dynamics in Mentoring

– Power is associated with the ability to get someone to do something they do not want to do

– Coercive power – the **ability to withdraw** or withhold rewards

– Expert power – derived from **experience**, superior **knowledge**

– Mentees can balance the power in relationships by **withdrawing literally** and **psychologically** from the relationship

– Defensive behaviour is to be expected and can be considered to be part of the process

– When coachees/mentees feel threatened in their autonomy or feel the need to protect themselves defensive behaviour should be expected

– Defensive behaviour also has the potential to limit the usefulness of coaching/mentoring

– Dilemmas can arise when managing multiple agendas

Power Dynamics: Relationships

a. **Relationship between sponsor and organisation**: sponsor and organisation agree output and outcome indicators, target audience, and content of the training and coaching programme, reporting requirements.

b. **Relationship between the organisation and the mentee:** the organisation agrees with the mentee about ground-rules, expected behaviour, outputs and outcomes and reporting/feedback requirements, monitoring and evaluation processes.

c. **Relationship between organisation and mentor:** the organisation and the mentor agree on deliverables, output and outcomes and how to report them.

d. **Relationship between mentor and mentee:** Both agree on an agenda, learning outcomes, number of meeting, confidentiality and reporting requirements, feedback from the mentor and from the mentee (vis-á-vis the mentor and the organisation).

e. **Relationship between the training and the coaching programme:** What is the role of mentoring here? To support and contribute towards the learning outcomes of the training programme? Is the training programme designed to offer enough lee-way so that mentees can pursue their own agenda and support the process?

Multiple Agendas

a. Coachees/mentees suspect a **"hidden agenda"** set by others for them, maybe they have one themselves.

b. They might show **"apparent compliance"** with the objectives of the programme, partly because they fears sanctions from their family or a reduction of their welfare benefits.

c. Coaching/mentoring might become a **"poisonous gift"** when used to show that despite all efforts, Alfonso does not have the skills and attitudes to secure a job.

d. The coach might find themselves in a situation where they have to deliver "difficult messages" to Alfonso and become a **"loudspeaker"** on behalf of the programme.

Louis and Fatien Diochon (2014)

Key question: WHOSE AGENDA IS BEING PLAYED OUT?

Prompts

a. **Alfonso:** I don't know what to do with my life. I don't really care. Why can't you leave me alone? Eventually, I find something that works for me.

b. **Employer:** If you want a job, you need to change. Get a decent haircut. Iron your shirt. We expect everyone to be on time which means 5 minutes early.

c. **Mentor 1:** You need to learn certain skills or you won't make it! The skills you have are not good enough. I see some deficits which needs to be addressed in line with the programmes objectives.

d. **Mentor 2**: It is ok not to know where you want to go next. This is a space where you can be who you are. The more you are aware of the skills you already have and how to use them, the more likely it is that you will find something that interests you.

e. **Parents:** You have to do something about your life. You cannot live here forever. Make yourself useful, get a job!

Strategy: Exit – Voice – Loyalty

a. **Exit** could refer to end the coaching assignment.

b. **Voice** could refer to discuss dilemmas with the organisation and/or the mentee.

c. **Loyalty** could refer to a mentor to be loyal vis-á-vis the organisation and to continue with the mentoring assignment, respecting the objectives and outcomes of the mentoring assignment – or being loyal to the agenda of the mentee.

Nizet et al. (2021)

Discussion

1. How might different agendas manifest themselves and impact the mentoring assignment? Does it matter? How would you deal with them as a mentor with a view towards voice – exit – loyalty?

2. How would you deal with ethical dilemmas (when supervision is not available)? Who would you contact to discuss such issues? Who might be helpful?

3. What is your take-away from today's session?

References and Suggested Reading

Alred, G. and Garvey, B. (2019) *Mentoring*. La Vergne: Management Pocketbooks (Management Pocketbooks).

Garvey, B., Stokes, P. (2022) *Coaching and Mentoring : theory and practice*. 4th edition. London: SAGE.

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Rosile, G. A. (2016). *Tribal wisdom for business ethics*. Bingley: Emerald Group Publishing Limited.

Links: YES! website
https://youngentrepreneurssucceed.com/resources/

Case Studies Series
Workshop 2 for Mentors

Relationship, External Resources

Agenda

– Introduction: Relationship, Trust, Rapport, Transparency

– Case Study from Greece
– Reflective practice – breakout session

– Dimensions of the mentoring/Mentoring Relationship

– External Resources

– Discussion, conclusion
– What's next?

Quality Relationship – Trust

Mentoring Relationship:

- A situation in which two people's feelings, thoughts and behaviours are mutually and causally interdependent.

- Relationships are dynamic, change over time and consist of the actions of both individuals.

- The quality of relationships is determined by the interrelations and interactions between the two people concerned and the interdependence they experience.

Trust:

- is the mutual confidence that supports the client's willingness to be open, honest and vulnerable and allows the mentor to be supportive, non-judgemental and challenging.

- the presence of trust allows sharing of sensitive, personal information and means mentor and client are more likely to engage in risk taking behaviours to facilitate the change desired

Rapport and Transparency

Rapport:

− Is about reducing the differences between the mentor and client and building on similarities.

− Being at ease with the other person, showing warmth, genuine interest, mutual attentiveness, respect, and positivity

− Rapport can be seen to be developing or diminishing all the time and needs investment to maintain it.

− Successful mentoring is dependent on a strong trusting relationship rather than the processes and techniques of the mentor

Transparency:

− Being transparent and explaining the mentoring process assisted mentors and mentees to settle into the relationship from the beginning and work towards their desired outcomes.

− Transparency also helps reduce uncertainty

De Haan & Gammon (2016)

Reflective Process

1. **What happened?** What struck you? What did you notice, think, feel?

2. **So what?** What seems to be relevant? Why does it matter?

3. **Now what?** What might impact, influence the mentee space? What might be a good way forward?

I.
What
happened?

III.
What next?

II.
So what?
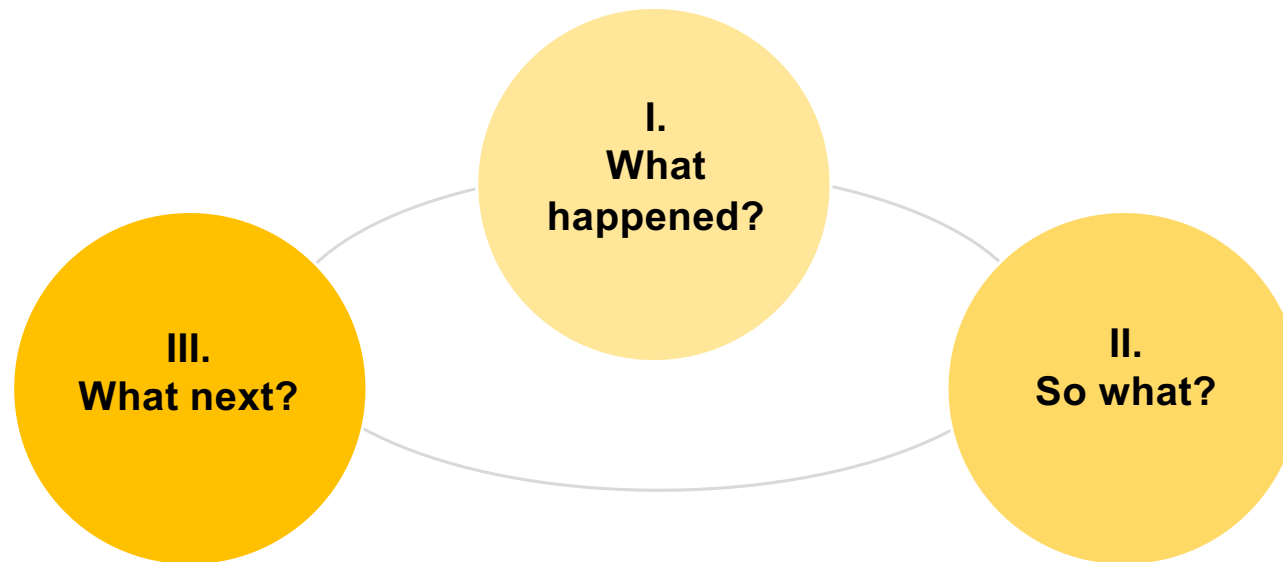
Adapted from: Alred, G. and Garvey, B. (2019)

Meet Nick – A Case Study from Greece

Nick (26) lives in a small town in Thessaly. He has always been very interested in computers and programming. At some point he enrolled in engineering at a university but found out that university and engineering is not for him and left uni. He spent quite some time assembling and dismantling every single piece of machinery he could lay his hands on. He built his own computers and started programming. When he learned about a Python course close by he signed up for that course. He wanted to have a certificate and find a job.

He was offered a mentoring programme which helps young people to draft CVs, covering letters and how and where to look for jobs. In addition to the mentoring programme he started to learn other programming languages. He was very much aware that he had to compete with younger and probably better qualified (on paper) applicants who were interested in the same jobs as him. At 26, he wanted to stand on his own two feet and become financially independent from his family with whom he kept living together. However, Nick wanted a quick-fix solution, he was impatient and had very ambitious ideas. He started to doubt the usefulness and value of the mentoring session. He was aggressive and offensive and showed little interest in the tools and steps the mentor suggested. The mentor decided to drop the suggested process of the mentoring programme. In their next session she asked Nick to share more about his interests and way of life.

Meet Nick – A Case Study from Greece

At that point Nick share that he is on the Asperger spectrum, is not much interested in socializing – except for spending time with his girlfriend. He shared that he reads a lot and likes to learn more about self-development. His mentor made a couple of suggestions what books to read and they discussed the pro and cons of different processes and techniques Nick has read about. The mentor gave Nick all the time he needed and invited him to co-create a space where Nick could relax, set the agenda and make use of techniques he had read about.

Nick received a job offer and signed a contract. A couple of days later he was invited for another job interview and was offered a job. He was deeply and found it difficult to deal with the situation and asked the mentor to help him dealing with the situation. The depth of trust and sharing might be easy for others, for someone on the spectrum it can be very challenging. Nick decided to leave the first company after 8 days and signed a contract with the other company. This might be considered a rash or bold move. But Nick had a gut feeling that the second job offer was more what he was looking for.

Reflective Practice

– Groups of 3 – 4 people

– Share your name, where you are from, what you would like to take away from today's session

– Assign someone to share in plenary

– Time: 15'

1. **What happened?** What stands out? What did you notice, think, feel?

2. **So what?** What seems to be relevant? Why does it matter?

3. **Now what?** What might impact, influence the mentoring space? What might be a good way forward?

Alternative questions

– What role might the quality of the relationship between mentor and mentee play?

– How did the mentor build trust, rapport and created transparency?

– What would have been your approach as Nick's mentor?
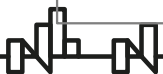
Dimensions of the Relationship

OPEN — CLOSED: OPEN – mentor & mentoree agree on topics and content; CLOSED – Only certain topics are discussed, probably the agenda is set

PUBLIC — PRIVATE: PUBLIC – Information will be shared with others, PRIVATE – everything discussed is confidential

FORMAL — INFORMAL: FORMAL – agenda, time, place very likely set; INFORMAL – agenda, time, place very likely to be agreed on between mentor & mentoree

ACTIVE — PASSIVE: ACTIVE – mentor is more active, directive, sharing experience, teaching (addressing deficits); PASSIVE – mentoring is nondirective, more developmental

STABLE — UNSTABLE: this dimension is about consistency in the process (judgemental vs non-judgemental, time, process & techniques). Who sets the agenda?

Dimensions of the Relationship

- Relationships are dynamic, change over time

- Careful contracting critically important

- mentors/mentees have different learning styles and needs

- Mentors/mentees do not work in isolation.

- Self-mentoring is a process that may enlist others, as needed, to provide feedback and comment.

- It is essentially a self-reflective activity aimed at developing individual agency.

| OPEN | - - - - - ◼ - - - - - | CLOSED |
PUBLIC	- - - - - ◼ - - - - -	PRIVATE
FORMAL	- - - - - ◼ - - - - -	INFORMAL
ACTIVE	- - - - ◼ - - - - -	PASSIVE
STABLE	- - - - - ◼ - - - - -	UNSTABLE
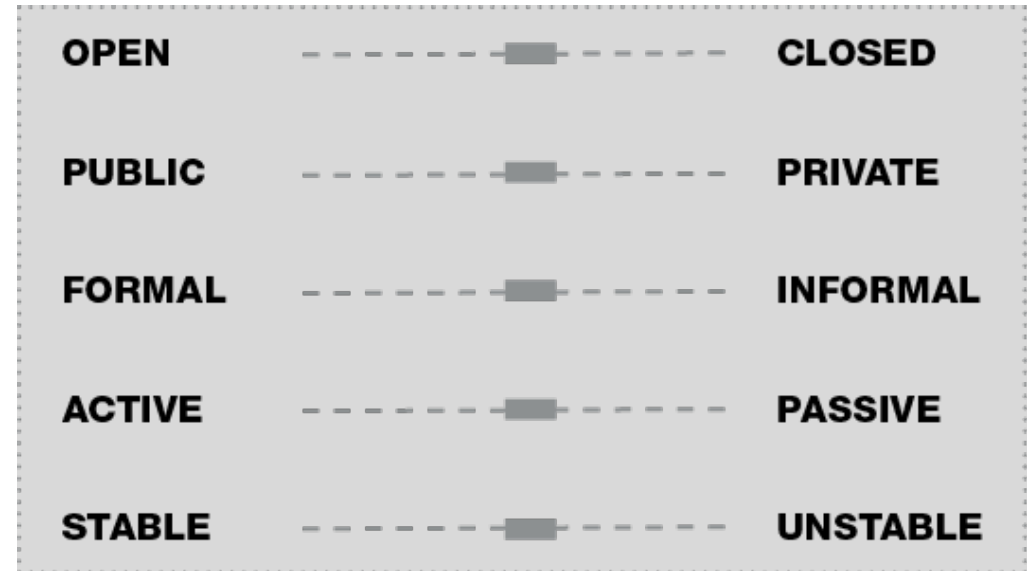
External Resources

Key question: Who else might be able to help you with this?

Networks:

- Family & friends

- Clubs, associations: Lions Club, Rotary Club, Business Network International (BNI)

- Chamber of Commerce/Trade

- Local level: gate keepers

- Mentor meetings

- Social media networks (Twitter, Facebook, LinkedIn)

Process: Effectuation Cycle
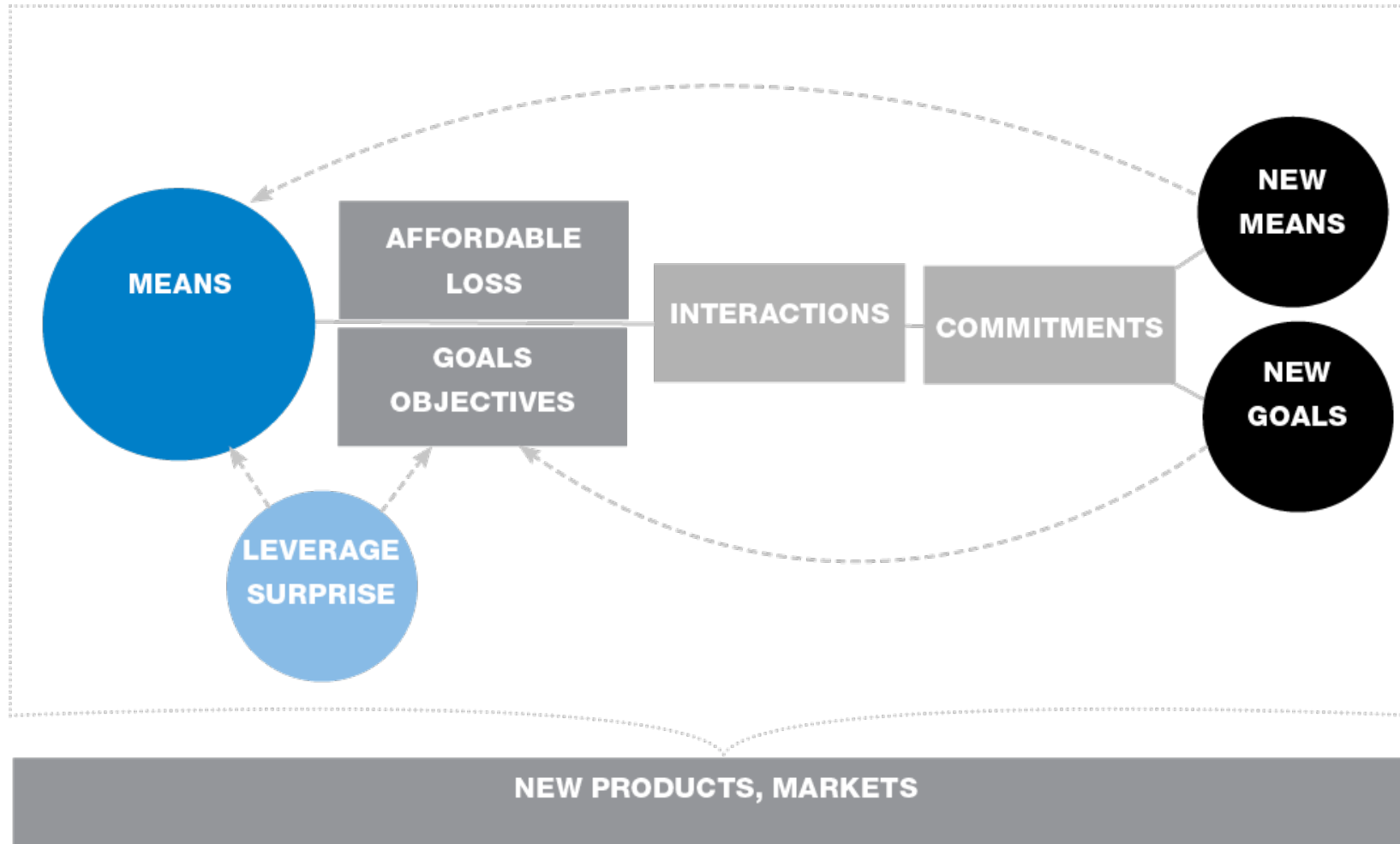
Adopted from www.effectuation.org

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De Haan, E., Gammon, J. (2016) The mentoring Relationship, In Bachkrivoa, T., Spence, G., Drake, D. (Eds.) The SAGE Handbook of mentoring. SAGE Publications Ltd

Garvey, B. (forth coming 2023) Mentoring Origins and Evolutions, In: Law, D., Dominguez. Travis, T. (Eds) Making Connections: A Handbook for Effective Formal Mentoring Programs in Academia, Utah State University Libraries.

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Links: YES! website
https://youngentrepreneurssucceed.com/resources/

Case Studies Series

Workshop 3 for Mentors

Issues belonging, gender and diversity

Agenda

– Introduction: Belonging

– Case Study from Italy

– Reflective practice – breakout session

– Discussion

– What's next?

Belonging

– Sense of belonging is influenced by various factors including family, ancestry, and life experiences.

– Belonging can involve navigating between different languages, cultures, beliefs, and traditions.

– Mentors should be compassionate and create a safe space for clients to express their experiences and feelings of not belonging.

– Humans have a fundamental drive to form meaningful connections with others.

– Look out for feelings of shame in mentees.

– People from different backgrounds can face similar problems.

– Feeling accepted and psychologically safe is essential for a true sense of belonging.

– Need to belong is crucial for wellbeing and identity.

Shah, S. (2021)

Johns' Reflective Model

- **Looking in –** Focus on self, thoughts and emotions

- **Looking out** – Reflecting of context and surroundings. What is significant?

- **Aesthetics** – What was I trying to achieve? What made me respond like that? What were the consequences? How were others feeling? How did I know this?

- **Personal** – Why did I feel the way I did in that situation?

- **Ethics** – Did I act in the best way for the best reasons?

- **Empirics –** What knowledge could I have used to inform me?

- **Reflexivity** – How does this relate to other experiences? How could I handle it better? What would be the consequences of doing things differently? How do I feel about this experience now? How can I support myself to achieve better consequences in the future? How available am it to work with people to meet their needs?

Meet Jazmine – A Case Study from Italy

Jazmine is a young woman residing in a rural and economically underprivileged area in northern Italy. After completing high school, she dreamed of pursuing a career in fashion design, but due to financial constraints, her family was unable to support her university education. She gained some informal work experience, but it was short-lived and left her feeling uncertain. She attempted to study languages at university, but dropped out after just one year. She remains uncertain about her future and is considering various options such as social media marketing, copywriting, and design.

During the post-training session, the mentor discussed the possibility of her creating her own path. Jazmine said: "there's no way for 'girls like me, I am Muslim, dress properly (stylish but religion compliant), without paying too much". However, she identified a gap in the market for modest and stylish clothing options that are also religiously appropriate for Muslim women like herself. She conducted research, developed a business model, and created a business plan. However, she has been inconsistent in pursuing her dream. She often changes her mind and struggles to stay focused. She is unsure whether to launch her brand immediately or seek a job and work on her business simultaneously. At times, she even considers returning to school or university.

The mentor feels keeping up with her and maintaining her focus has proven to be a challenge.

Reflective Practice

– Groups of 3 – 4 people

– Assign someone to share in plenary

– Time: 15'

Think of belonging, gender, diversity:

1. **What happened?** What stands out? What did **you** notice, think, feel?

2. **So what?** What seems to be relevant? Why does it matter?

3. **Now what?** What might impact, influence the mentoring space? What might be a good way forward?

Johns' Reflective Model

- **Looking in –** Focus on self, thoughts and emotions

- **Looking out** – Reflecting of context and surroundings. What is significant?

- **Aesthetics** – What did the mentor try to achieve? What made you respond like that? What were the consequences? How were others feeling? How did you know this?

- **Personal** – Why did you feel the way you did in that situation?

- **Ethics** – Did I act in the best way for the best reasons?

- **Empirics –** What knowledge could you have used to inform you?

- **Reflexivity** – How does this relate to other experiences? How could you handle it better? What would be the consequences of doing things differently? How do you feel about this experience now? How can I support myself to achieve better consequences in the future? How available am it to work with people to meet their needs?

References and Suggested Reading

Garvey, B., Stokes, P. (2022) *mentoring and Mentoring : theory and practice*. 4th edition. London: SAGE.

Johns, C. (ed.) (2017*) Becoming a reflective practitioner*. Fifth edn. Chichester, West Sussex: Wiley.

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Links: YES! website
https://youngentrepreneurssucceed.com/resources/

Case Studies Series
Workshop 4 for Mentors

Working with goals, goal orientation and their dark side

Agenda

- Introduction: Goals, goal orientation

- Case Study from Italy

- Bridges' Model of Change

- Reflective practice – breakout session

- »Coddiwomple«

- Storyboards

- Supervision in coaching & mentoring

- Discussion

Goals & Goal Orientation

– Most used process model in coaching and mentoring is GROW (Whitmore)

  – **G**oal

  – **R**eality

  – **O**bstacles

  – **W**ay forward

– The model focuses on performance improvement (sports!)

– Almost all curricula include setting goals and goal orientation

– In some contexts working with goals can be useful, i.e. when the coachee/mentee has a good understanding of where they want to go and how to get there

Dark Side of Goals

– You can reach a goal, over-perform or under-perform. So what?

– In organisational context goals are used as an instrument of control and management (for the benefit of the organisation). Whose agenda is being played out?

– Not being able to achieve goals can negatively impact well-being and confidence

– In some contexts working with goals can be useful, i.e. when the coachee/mentee has a good understanding of where they want to go and how to get there

– When coachees/mentees are in phase of transition working with goals rarely works

Bridges' Model of Change

The New,
New beginnings

Neutral Zone

Endings,
Loss,
Letting go

time
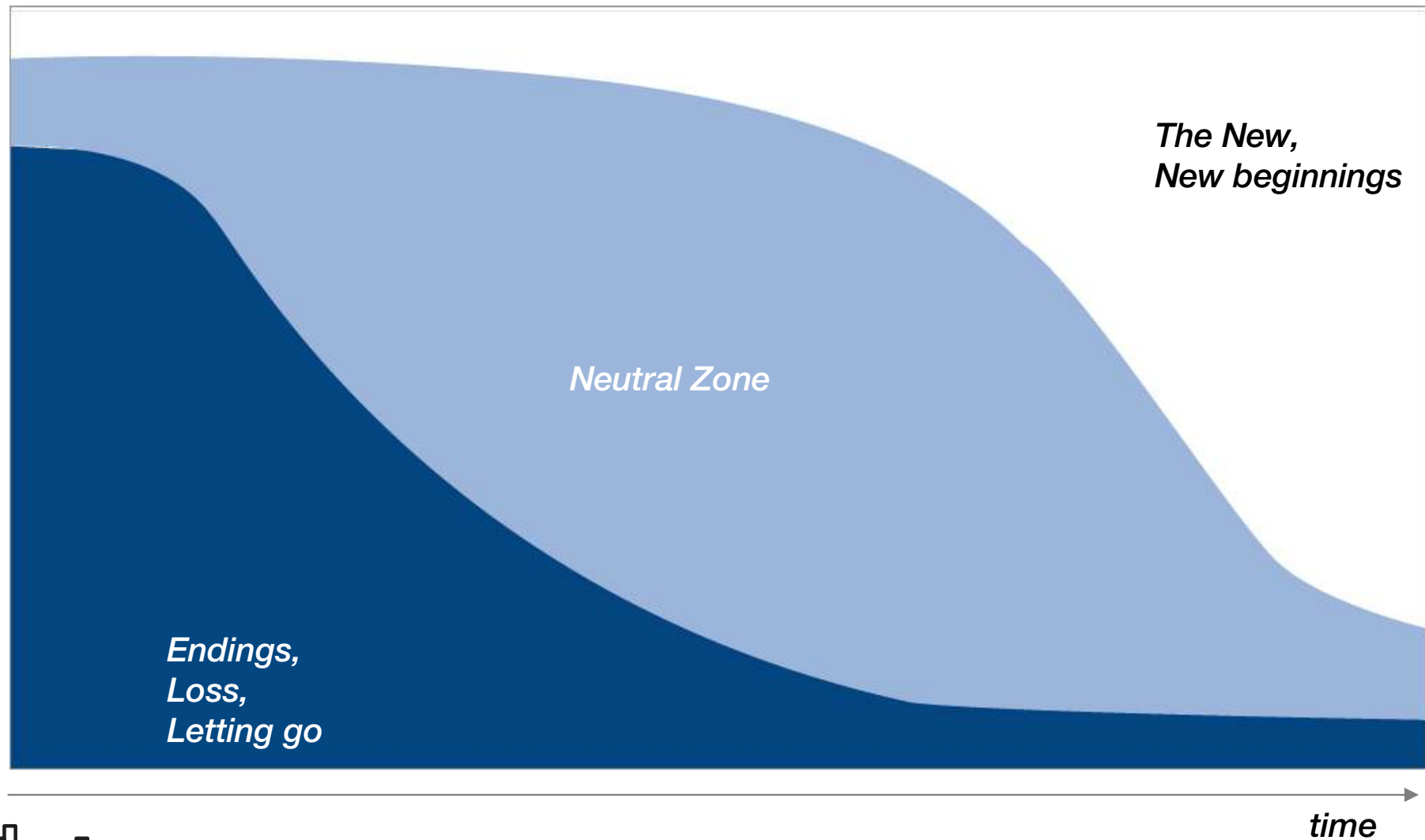
Meet Ella – A Case Study from Italy

Ella is a mother of one child who lives in a small city in northern Italy, an area known for its industrialization. Initially enrolled in a gymnasium, she decided to switch to a technical school after the first year as she had no intention of pursuing a university education. After completing five years of schooling, she began working at a factory, finding satisfaction in manual labour. However, her contract was not renewed after three years, forcing her to search for new job opportunities. Eventually, she secured a position as a warehouse and logistics operator, bringing her joy. Unfortunately, the company experienced a fire and had to close down. Although her employer offered her a position at a subsidiary, it was far from her home and she had a new-born to care for. From that point on, life became increasingly challenging for her. She tirelessly searched for part-time employment to achieve a better work-life balance but encountered numerous closed doors. In an effort to enhance her chances of re-entering the job market, she sought out training courses and assistance. During this process, she specifically requested to work with a female mentor. Over the course of a year, she received support, identified suitable training programmes, and ultimately secured a job as an administrative clerk working six hours a day.

Reflective Practice

– Groups of 3-4 people

– Assign someone to share in plenary

– Time: 15'

If you were a fly on the wall observing your own session what would you see?

What would a different fly see?

OR

1. **What happened?** What stands out? What did **you** notice, think, feel?

2. **So what?** What seems to be relevant? Why does it matter?

3. **Now what?** What might impact, influence the C&M space? What might be a good way forward?

A way forward

to coddiwomple

- *To travel in a purposeful manner towards a vague destination*

Tip:

- You don't need to know exactly where you are going

- It is perfectly ok to experiment and find out what the destination will look like as you move forward

- Expect the unexpected, a surprise element, as you go along.

- Ideas and solutions will present themselves

Storyboards

- Start by drawing 6 boxes. The first box is the starting point the last box the end point (of the story)
- All boxes contain graphic elements **and** 1 (!) word, preferably a verb

START	ACTIVITY 1 VERB	ACTIVITY 2 VERB
ACTIVITY 3 VERB	ACTIVITY 4 VERB	END

Storyboards: example

How to *coddiwomple?*

What can you do (activities) to get to the endpoint?

How do you feel along the way?

Use one word to describe the activity, preferably a verb
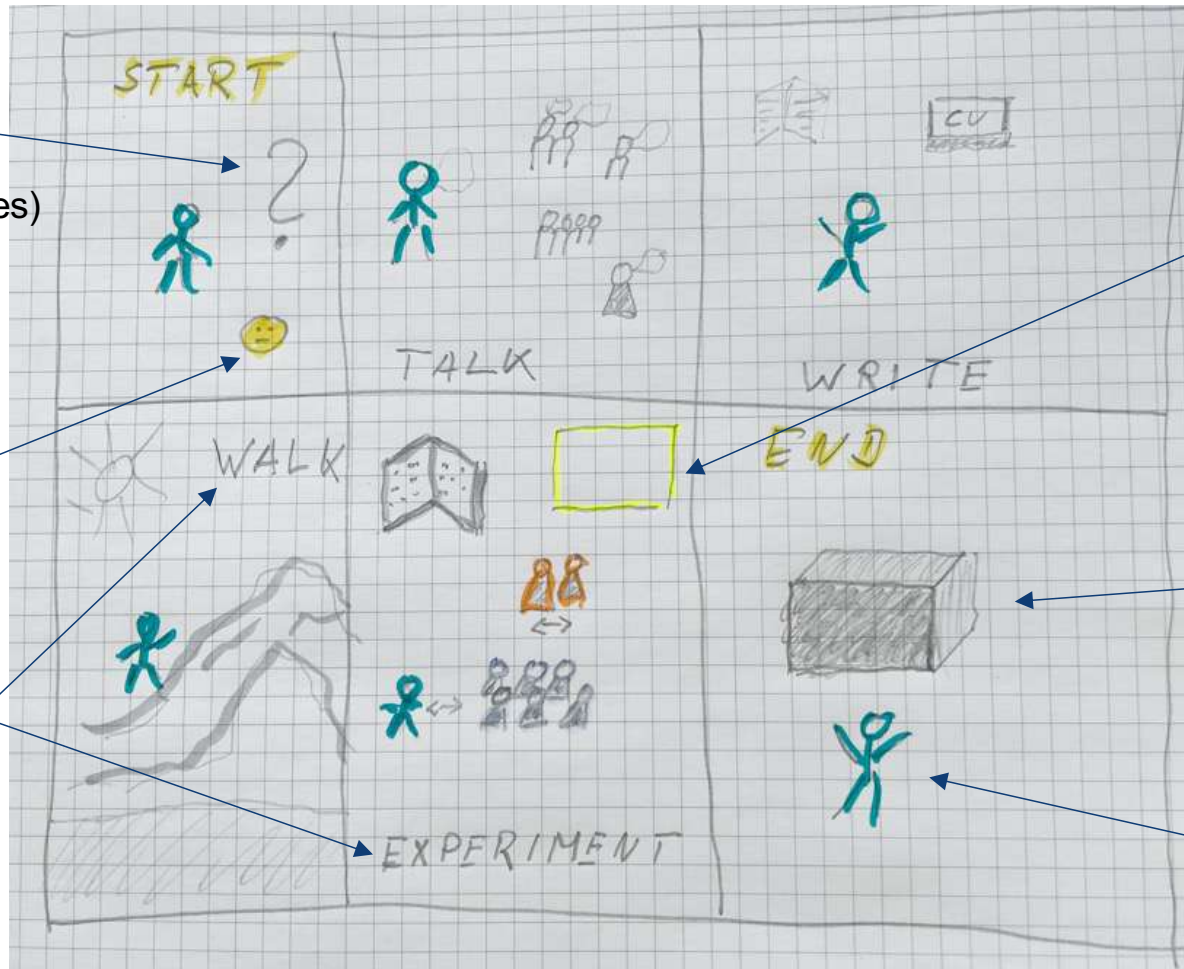
The empty frame represents an element of surprise. You don't need to know what it is now!

Black box, when you don't know how the endpoint looks like

How do you feel when you get there?

What is supervision/peer-learning?

– Supervision is support for your practice as coach/mentor, and is guided by the question what aspect of your practice you want to improve.

– Supervision is not about surveillance or about what's right or wrong.

– **»Develop a practice of coaching/mentoring from who we are.«** (Jackson & Bachkirova, 2018)

Tipp:

– Use real examples from your practice.

– Find like-minded people to discuss the case, issues you noticed or aspects which are bothering you.

– Think of the flies on the wall – what would they see?

– Reflective diary

References and Suggested Reading

Garvey, B., Stokes, P. (2022) *Coaching and Mentoring : theory and practice*. 4th edition. London: SAGE.

Jackson, P., Bachkirova, T. (2018) The 3 Ps of supervision and coaching: philosophy, purpose and process.

Johns, C. (ed.) (2017*) Becoming a reflective practitioner*. Fifth edn. Chichester, West Sussex: Wiley.

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Links: YES! website
https://youngentrepreneurssucceed.com/resources/

More information: YES!

https://youngentrepreneurssucceed.com

Annex 3: Mentee Profile

Please complete this form as detailed as possible so that we get to know you and your interests better and match you with a mentor that is a good match. The information you provide in this document will only be used internally for the matching and will not be shared with third parties.

When you have completed the document, please return it to the following email address: *email*

Thank you!

Contact details

Salutatory Address	Mr., Mrs., Ms.		
First Name		Name	
Phone		Email	
Name of business			

What topics would you like to discuss with your mentor?

Management (corporate)		Employees / Recruitment / HR	
Business planning		Accounting, bookkeeping	
Business strategy; business models		Tax related issues	
Product and product development		Legal issues	
Marketing/PR		Information and communication technologies	
Digital Marketing		Web/Search Engine Optimization	
E-commerce		Financial management	
Sales		Access to finance	
Customer development/customer relationships		Time- and self-management	

International trade		Professional networks	
Social entrepreneurship		Working with others	
Decision making		Resilience	
Career planning		Job search strategies	

Other (please specify)

When do you plan to start or when did you start your business? Did you write a business plan? What are your concrete plans at the moment?

What are your interests/hobbies?

(Tell a bit about yourself - you are welcome to share some fun/interest/unusual qualities here ☺)

Why would you like to work with a mentor? What would you like to get out of it?

(Briefly describe your motivation and what you would like to get out of a mentoring relationship)

Is there any information about you and your business that might be relevant for the matching?

Values

(Choose 3 personal and/or economic values from the list, which are especially important for you - as a behavioural guide or as an element of a positive way of life. Add to this list as you like.)

- adventure
- working on my own
- help other people
- recognition
- working with others
- working under pressure
- working peacefully
- excitement
- professional development
- democracy

- service for the public
- effectiveness
- honesty
- fast-paced life
- influence on others
- commitment
- close relationships
- determination
- ethical behaviour
- expert knowledge
- family
- helping others

- friendship
- leadership
- money
- community
- cheerfulness
- challenges
- inner harmony
- integrity
- intellectual status
- competence
- controlling others
- cooperation
- physical challenges
- creativity
- art
- performance
- love & affection
- power & authority
- nature
- rules/order
- personal development
- exploiting own potential
- quality of things I participate in

- quality relationships
- wealth
- purity
- religion
- fame
- self-respect
- safety
- exiting work
- top performance
- stability
- status
- spirituality
- spontaneity
- meaning of life
- environmental awareness
- independence
- responsibility
- visions
- diversity & change
- growth
- truth
- wisdom
- financial security

My core values are:

1	
2	
3	
4	
5	

Annex 4: Mentor Profile

1. Contact details and personal information		
Salutatory address		
First Name		Name	
Phone		Email	
Gender		Date of birth	DD/MM/YY
Country		

2. Educational and professional information

Educational level		Tittle	
Company		Position	

3. Work experience and Background

(brief summary of professional history and description of current position)

4.   In which areas would you like to support your mentee?
(Please indicate with an "x")

Management (corporate)		Employees / Recruitment / HR	
Business planning		Accounting, bookkeeping	
Strategy		Tax related issues	
Product and product development		Legal issues	
Marketing/PR		Information and communication technologies	
Social Media/ Digital Marketing		Web/ Search Engine Optimization	
E-commerce		Financial management	
Sales		Access to finance	
Customer acquisition/ customer relationships		Time- and self-management	
International trade		Professional networks	
Social entrepreneurship		Working with others	
Decision making		Grit	
Career planning		Job search strategies	
Other (please specify)			

5. In what areas do you have specific expertise that might be relevant for working with your mentee?

6. **What are your interests/hobbies?** (Tell us something about yourself - you are welcome to share some fun/interest/unusual qualities here ☺)

7. **Why do you want to become a Mentor? What do you hope to get out of it personally?** (Briefly describe your motivation and what you would like to get out of a mentoring relationship)

7.2. Are you interested in additional advanced mentor trainings? Are there any topics you are interested in or that might be relevant for you as a mentor?

8. **Do you have previous experience in mentoring?** (If you do, please specify)

9. **Is there any other information that might be relevant for the matching?**

10.   Values & Principles

(Choose 3 personal and/or economic values / principles from the list, which are especially important for you - as a behavioural guide or as an element of a positive way of life. Add to this list as you like.)

- o   adventure
- o   working on my own
- o   help other people
- o   recognition
- o   working with others
- o   working under pressure
- o   working peacefully
- o   excitement
- o   professional development
- o   democracy

- o   service for the public
- o   effectiveness
- o   honesty
- o   fast-paced life
- o   influence on others
- o   commitment
- o   close relationships
- o   determination
- o   ethical behaviour
- o   expert knowledge
- o   family
- o   helping others

- o   friendship
- o   leadership
- o   money
- o   community
- o   cheerfulness
- o   challenges
- o   inner harmony
- o   integrity
- o   intellectual status
- o   competence
- o   controlling others
- o   cooperation
- o   physical challenges
- o   creativity
- o   art
- o   performance
- o   love & affection
- o   power & authority
- o   nature
- o   rules/order
- o   personal development
- o   exploiting own potential
- o   quality of things I participate in

- o   quality relationships
- o   wealth
- o   purity
- o   religion
- o   fame
- o   self-respect
- o   safety
- o   exiting work
- o   top performance
- o   stability
- o   status
- o   spirituality
- o   spontaneity
- o   meaning of life
- o   environmental awareness
- o   independence
- o   responsibility
- o   visions
- o   diversity & change
- o   growth
- o   truth
- o   wisdom
- o   financial security

My core values are:

1	
2	
3	
4	
5	