



Mentoring and Guidance for Adults(50+)

Adults Mentoring

The Code of Practice for Adults Mentoring

Leonardo da Vinci Programme
European Commission

Procedure " B " Pilot Projects

BG/06/B/P/PP-166-041

PART 1. INTRODUCTION

- 1. Who this CoP is for?**
- 2. What is mentoring? A specificity of Adults mentoring (brief summary)**
- 3. What are the benefits of mentoring?**

PART 2 GOOD PRACTICE IN ADULTS MENTORING

Section 1 Recruitment

Section 2 Managing risks and challenges

Section 3 Matching mentors and mentees

Section 4 The induction and training of mentors and mentees

Section 5 Target-setting and agreements between the mentee and the mentor

Section 6 Monitoring and evaluation

Section 7 The validation of learning outcomes

PART 1. INTRODUCTION

1. Who this CoP is for ?

- This CoP is primarily focused at the promoters of workplace mentoring programmes for unemployed older people (50+). (From now on these programmes will be indicated as Adults mentoring programmes). It will help facilitators of the adults mentoring programmes to critically review their systems and how they work while also helping them to improve the quality of their schemes.
- It will be particularly helpful to first-time developers of adults mentoring programmes, through the advice about good practice it provides and by the links it offers to other resources.
- This CoP has been developed initially to meet the needs of organizers/facilitators of adults mentoring programmes such as SME's, NGO's, small training organisations, and others sharing their approach.
- The term mentoring is often used, for example, to cover aspects of professional training and coaching, where formal reporting requirements may constrain freedom of choice and confidentiality. Such circumstances may limit the applicability of the approach proposed here – but the Code should still provide some useful guidance and valuable stimulus for self-reflection. The crucial first step, as for all adults mentoring programmes, is to carefully consider and define the particular goals of the programme and to understand the particular requirements that such goals impose.

2. What is mentoring? A specificity of Adults mentoring (brief summary)

- A useful overall definition of mentoring as a concept is: "A one-to-one, non-judgmental relationship in which an individual mentor voluntarily gives his/her time to support and encourage another" (*Home Office (UK) 2001*).
- Adults' mentoring has been found to be effective in helping older people, often disadvantaged at the labour market to develop the abilities to meet a wide variety of challenges associated with integration in to contemporary job market and society as a whole. Enhancing employability is a common theme, but it is just one of the many challenges addressed within mentoring programmes.
- In more detail, some of the normal features of adults mentoring can be listed as follows:
 - a. It is a relationship involving regular meetings between the mentor and mentee, although the

frequency and duration of the meetings can vary considerably.

- b. Mentoring is a mechanism for sharing experience between two parties – a two-way street – with benefits for both players.
 - c. It is voluntary and informal. The process is not compulsory and highly regulated.
 - d. It is an organised relationship: partners are carefully recruited, rather than meeting by chance.
 - e. There is a co-ordinator who takes the lead role in matching partners and provides other support services.
 - f. It is governed by an explicit agreement – although the content of this may change over the course of the relationship.
 - g. As the main focus here is “age”, it happens that there is large age discrepancy between mentors and mentees. In some case this could be an intergenerational approach, where there is no dependency between experience, skills and knowledge.
 - h. Often this age discrepancy could raise difficulties in communication or interpersonal connections. This could be overtaken by careful/precise selection and matching processes.
 - i. It is time limited.
 - j. It is confidential between the parties.
- Each partner must agree to the choice of the other and both must have the option to withdraw if the relationship fails to work.
 - It must serve mentee’s needs and these must be properly identified, not simply taken-for-granted.
 - It is a learning process – beyond planned issues mentors and mentees learn about themselves, about each other, and about relationships.
 - It is about sharing power, even if the partners normally differ in status.

(Adapted from ‘Mentoring: a Good Practice Guide’ edited by David French, Baljit Gill and Tracy McSorley [Coventry University 2002])

3. What are the benefits of mentoring?

- Experience suggests that good adults mentoring programmes can significantly improve the social and personal skills of participants, building up their resources of the ‘soft skills’ and adaptability to contemporary job market that are crucial for employment. It is also very important that the benefits are not restricted to the mentee: mentors also gain.

- The following usefully summarises these benefits:

"All concerned parties gain from participating in mentoring relationships, whether these are the mentors, mentees, or the organisations where both are active. The mentee benefits from an improved self-confidence and self esteem, an increased motivation, a broadening of his/her horizons and experience and raised achievements and aspirations. The mentor obtains an immense satisfaction from helping another person grow, develops his/her interpersonal and communication skills, and increases his/her self-awareness. For the organisations themselves, there is the development of staff skills, the instilling of a feel good factor in staff, the positive publicity, and the shared learning." Source:

<http://www.brentbrain.org.uk/brain/brainzones.nsf/0/A64D0E1668F6DFBD80256FBF004C3E59?opendocument&Z=4>

PART 2 GOOD PRACTICE IN ADULTS MENTORING

Some preliminary points about your programme

The first step: define your objectives

Adults mentoring programmes often share some goals and differ in another. For example mentoring programmes typically aim to develop the self-confidence and self-awareness of mentees. But adults mentoring objectives may differ radically: some may be concerned with increasing employability, others with reducing the antagonism of older people against the new technologies, new constellation on the open labour market.

Have in mind that mentoring is bipartite process and both mentors and mentees benefits from it.

Some goals will relate to outcomes, e.g. as the mentees have developed specific life skills, their affords are focused on gaining concrete, "new" soft skills; others will be operational, e.g. were the target numbers of mentoring pairs reached and how many satisfactorily completed the whole mentoring cycle?

The essential requirement is that promoters of Adults mentoring programmes should define very clearly the objectives that they are seeking to achieve. Only on this basis is it possible to evaluate the success (or otherwise) of the programme. A clear statement of objectives is, therefore, the essential foundation on which the self-assessment process should be built.

Section 1

Recruitment

An active recruitment campaign is almost always necessary for a successful Adults mentoring programme - however worthwhile your objectives, people won't join if they don't know about it. Once the scheme is established they may come to know it by repute, but not at the start.

Efficient recruitment must be targeted – resources will be wasted unless they are directed at the groups you need to reach and you should make sure that your marketing reflects the needs and interests of the groups from which you are seeking to recruit.

You must ensure that you have all the basic information you need about recruits – a simple application form is essential. A long form may deter good participants, but you must have enough material to judge the suitability of applicants. You

should consider whether evidence from a reliable third party (e.g. employer, colleague) would be a useful and practical addition.

Successful marketing techniques for mentoring programmes have included:

- Posters, leaflets and flyers
- Targeted mail shots
- Presentations to invited audiences
- Testimonials and case studies
- Inclusion on websites

You will find it useful to work through contact networks, such as local employers, volunteer groups and organisations for specific target groups. Face-to-face recruitment and the word-of-mouth of well-disposed intermediaries can be very valuable. It can be helpful to emphasise that mentoring provides important benefits to mentors as well as mentees.

Remember also that you will need to recruit more participants than may seem to be required: some will drop out, others will prove impossible to match and some will prove to be inappropriate for mentoring. Always remember the risks that can be associated with mentoring. The timing of recruitment is important – there is little point in trying to recruit participants, in the middle of summer vacation periods. Also it is very important not to leave more than a short gap between recruitment and the start of the mentoring period: otherwise there will be a danger of potential participants dropping out.

Section 2

Managing risks and challenges

Although adults mentoring is normally an extremely positive experience for both mentor and mentee, it can pose some risks that may challenge the health and well-being of participants. For example:

- Mentoring is a close relationship; it is often hard work and can place considerable demands upon the psychological resources of both mentor and mentee.
- As an intimate, confidential, relationship, mentoring can be challenging. Either party may be vulnerable to exploitation by the other: bullying, betrayal of confidence and sexual aggression are all realistic possibilities. Adults mentoring often involves the participation – as both mentors and mentees – of people who come from socially disadvantaged backgrounds. For example long term unemployed, who may have a previous job experience, but not acquired skills and competences (including soft skills) required in current job market.

In addition to that, physical and cognitive changes take place as people age and are important to note because they can have an affect on our learning:

- Older learners have slower reaction times than younger ones. They need more time to learn new things, however, when adults can control the pace

of learning, they can often effectively compensate for their lack of speed and learn new things successfully.

- Vision generally declines from the age of 18 to 40. After 40 there is a sharp decline for the next 15 years, but after age 55 the decline in vision occurs at a slower rate.
- Around the age 70 our hearing begins to decline sharply and we begin experiencing problems with pitch, volume, and rate of response. Loss of hearing can be compensated for through the use of hearing aids, but often older learners may be embarrassed by their hearing loss and feel less confident. This decline in confidence can become a greater hindrance to learning than the physical disability.
- Few changes have been found in both sensory and short-term memory as we age, but long-term memory declines. Older adults have a harder time acquiring and retrieving information and they experience difficulties in organizing new material and in processing it. Older adults are not as able as younger learners in tests of recall, but the differences between older and younger learners in tests of recognition are small or nonexistent.
- When contextual learning approaches are used, less decline is found in the memory process as we age. The greatest problems with memory for older learners occur with meaningless learning, complex learning, and the learning of new things that require reassessment of old learning.

Adult learners' specificities

Although most of the Mentees often have lot of experience, they lack motivation. As it is true for adults of all ages, the previous educational level is the single best predictor of participation in non-formal and informal educational activities. The need analysis report accomplished under the framework of the Adults Mentoring project confirms that older people are more influenced by cognitive interest to engage in the mentoring programme than by any other factors.

Highly experienced older people who want stimulating activities participate in such activities because they are interested in knowledge. They aim to get familiar with current labour market constellation.

This finding has a practical implication for mentoring programme planning for older people. When developing programmes for older people, have to bare in mind that these should cover their interests and needs. This actually arises the **need for training in motivation**, while also focusing on new tendencies and taking equally into account the **relevance of the required skills and competences**.

Furthermore, a particular lack of adaptive social behaviour (i.e. personal and interpersonal skills) is observed among older people. These are mainly the soft skills, but also the more practical (hard) technical skills, as well as the ICT skills which are becoming increasingly more important to a degree that they are basically needed in every kind of job.

But these challenges can be minimised with careful planning, effective monitoring and good support systems.

Remember that people at risk are often reluctant to report their worries: although you won't want to cause unnecessary anxiety, you should aim to create an environment in which participants feel comfortable about voicing their concerns before they become serious. For example it may be helpful for each mentor and mentee to have the same person as their regular contact throughout the whole process, so as to establish a friendly face in case problems arise.

Section 3

Matching mentors and mentees

It is self-evident that good procedures for matching mentors and mentees are fundamental to any successful mentoring programme. The precise criteria will vary from scheme to scheme, but overall the experience and competences of the mentor need to harmonise with the background and needs of the mentee and vice versa.

On the other hand it is essential that expectations are not unrealistic. The role of the mentor is to provide support and guidance: crucially it is to help the mentee develop her/his own skills and competences, not to provide detailed instruction in the performance of technical tasks. So, even if the mentoring is employment-related you may not need to find a mentor who is a technical expert in the same field as the mentee aspires to enter. The matching process can reflect this type of flexibility.

You should also recognise that the information needed for successful matching can be difficult to identify and that evidence can be unclear. So you may want to think about corroboration, perhaps in the form of references. But remember that some of the people you deal with may not have led the regular lives that lend themselves to the gathering of reliable references or similar evidence.

Important issue in matching of mentees and mentors is question about age discrepancy. In some cases mentors could be younger than mentees. The main focus is about appropriateness of personal characteristics and professional experience. It's hard to deduce a rules for best matching based of specific characteristics.

Section 4

The induction and training of mentors and mentees

Most of the skills needed by mentors and mentees are ones that have a wide application in other areas of social life: for example, for mentors the most important skills are the ability to listen and to draw out the thoughts and ideas of another person, in this case the mentee. Such skills are commonly used by many people in their day-to-day lives, but practice in them within a well-thought-out training programme will normally make a mentor far more effective. Good training underpins the success of all effective mentoring programmes.

It is important also to see all stages of induction and training as steps in a single process. From the first recruitment publicity onwards, the mentor and mentee will be gaining knowledge and understanding of the nature of mentoring and each step must contribute to the overall process.

You should consider whether, at an appropriate point in the training process, participants should be asked to sign an Agreement to explicitly confirm that they accept the overall rules of the programme, in particular about confidentiality, about monitoring and about the nature of their responsibilities. You may prefer to deal with this as part of the first mentor/mentee Agreement. The choice is yours, but it is essential that the issue is explicitly addressed at one point or the other.

It can be helpful to encourage mentors and mentees to recognise the boundaries of their normal interaction and to understand the need for delicacy and care if either feels that they should raise issues, perhaps of a personal nature, that go beyond these limits. If you take this approach, you should address it specifically in the training process.

The way you organise training will vary to fit the challenges of your programme: for some groups of mentors or mentees it will be appropriate for all training to be face-to-face. Others may benefit from a blended learning approach (a mixture of face-to-face and distance learning) – and the materials used in distance learning may sometimes be in hard copies, in others online. The important factor is that there should be a clear and appropriate rationale that ensures that the structure and content of the training programme is consistent with the needs of the target group. Normally the training programme will be based on an overall manual that participants will retain as a reference guide throughout the mentoring experience – and this manual should be designed to be suitable for the needs and abilities of the user-group concerned.

Time is a key aspect of successful training programmes: you may have to balance the pressures on the sometimes busy schedules of participants with the need to ensure that mentors and mentees give enough time to training to enable them to meet their responsibilities effectively.

Section 5

Target-setting and agreements between the mentee and the mentor

There are two main purposes for Agreements between the mentee and the mentor, and agreement about them may be reached at quite different stages of the mentoring process. So you should consider developing two separate Agreements. If you do, you will need to give them distinctive titles so that their

different roles are made clear: perhaps *'Agreement about procedures and roles'* and *'Agreement about objectives and outcomes'*, but maybe you can think of better, less formal, alternatives.

- The first Agreement concerns the need to ensure that both parties understand and are committed to the basic operational rules of your programme and to the overall responsibilities of mentoring. This type of Agreement may be provided for the two parties in a standard format that identifies the key areas and provides a basic set of ground rules for all participants. Alternatively you may present a series of more general questions and allow participants to develop their own approach. The key requirement is that the two parties must have, from the start, a clear, shared, written-down, Agreement about how they will operate. This should have within it procedures in case things go wrong, whether at the mundane level when one party misses an appointment, or more seriously if, for example, a personality clash emerges.
- The second type of Agreement (sometimes called a 'Development Plan') concerns the outcomes that the mentee is seeking to achieve as a result of the mentoring process. This is a vital mechanism for identifying the progress that the mentee is making and in enabling the mentor to play her/his full part in the process. For obvious reasons this Agreement should be reached as early as possible during the mentoring process – but this may not always be very near the start. Sometimes the first stage of mentoring involves the development of the ability required to enable the preparation of the Agreement – many mentees will not initially have the skills of self-awareness to be able to identify their own goals and it is likely to take some time before these goals can be framed in terms of specific objectives. This Agreement is less likely to follow a standardised format. You may wish to set general questions, to ensure that all important issues are covered, but you must expect different participants to take somewhat different approaches.

Remember at all times that the simpler and the clearer you can make the format for your Agreements, the more effective they will be and the more likely it is that participants will follow them. The Agreements can offer guidelines and suggestions – but remember also that ultimate responsibility lies with the participants and they should be allowed room to make their own detailed arrangements.

Section 6

Monitoring and evaluation

The overall functions of monitoring and evaluation divide into two categories: the first is about individual mentoring pairs and their progress; the second concerns the effectiveness of the mentoring programme in achieving its objectives.

Monitoring the progress of mentoring pairs

Monitoring in this respect must reconcile requirements that are potentially in conflict with each other.

- On the one hand confidentiality and flexibility are intrinsic to successful mentoring. Both parties must feel free to talk openly about what may be very sensitive subjects that they would not wish to be more widely exposed. Similarly they may need to adapt their operational arrangements to meet requirements that are confidential between them. As a matter of principle, the mentee and mentor take joint responsibility for their arrangements and in some crucial respects 'ownership' lies above all with the mentee.
- In contrast, some monitoring of mentoring partnerships is essential.
 - Promoters need to know whether the participants view their experience as successful and what aspects worked well or badly, so that future practice can be improved.
 - Similarly promoters need to know what the participants did in order to be able to relate this to positive and negative feedback.

Monitoring and evaluating the operation of the overall programme

Work in these respects does not present the same unusual challenges as are dealt with above, except, of course, that every effort must be made to ensure that confidential information about individual mentees or mentors is not revealed in any process of overall reporting. Specific examples can be very valuable in reporting on any programme – but if used in relation to mentoring particular care must be taken to remove any possible identifying details and, where appropriate, to obtain the consent of the individuals concerned.

Section 7

The validation of learning outcomes

Introductory note

The structure of this section of the CoP is different from the others. It provides a longer explanatory statement dealing with a series of important background issues and some overall principles concerning the validation of learning.

The main reason for this is that validation – in particular the recognition of learning outcomes achieved by mentees – is an aspect of mentoring that remains somewhat controversial and that many mentoring programmes do not yet implement. There are real difficulties in any formal assessment of the achievements of mentees: too readily it can interfere with and distort the operation of the mentoring relationship. So the attempt to assess can easily prejudice the success of that which is being assessed.

This document presents an approach to validation that is built on three core principles:

- Validation should give the mentee the opportunity to achieve recognition for her/his learning;
- It must vary in format and level of detail to suit the preferences of the mentee;
- It should be designed not to interfere with the mentoring process itself.

The purpose of validation

The validation of non-formal and informal learning enables the achievements of learners to be properly taken account of by those who may be considering the learner as a candidate for employment or further training. This is a major benefit to learners who often lack other, more conventional evidence of their abilities. But 'validation', the demonstration that learning has taken place, requires processes that can have other important benefits for the learner.

- They require and enable learners to recognise their own learning – programme promoters should be aware that learners frequently lack the skills to recognise that learning has taken place. Developing such skills must be built into the learning process and learners should be helped to recognise their starting point, in order to understand the value that mentoring has added.
- They also require the recording of learning, allowing individuals to build a profile and present a picture of themselves, that draws together learning that may have taken place in a variety of settings.
- The process also encourages reflection by learners on their own learning.

Despite these benefits, it is essential to remember that participation in the validation process is, and must remain, optional. Mentees may choose to opt out of the whole process or of any part. So, for example, they might produce a learning statement, but choose not to compile a portfolio or to develop a full CV.

Similarly some Adults mentoring programmes may choose not to offer validation to their participants. But it is important that all programmes should seriously consider doing so and it is recommended that the rationale for any decision not to do so is made clear. It should be remembered that validation offers genuine, important, benefits to mentees, particularly in a future of unstable job-markets.

So programmes should not decide against offering a validation process without carefully considering the arguments in favour of at least a partial form of validation and evidence of this consideration should be presented in the Statement of Self-Assessment.

Our model for the validation of learning outcomes

The core principal of our model is that the learner should be able to draw on three ways of recording learning achievements. The learner may choose a simple Statement; May decide to produce a wider portfolio of evidence; May also wish to represent learning achievements on a European CV. The learner will be free to choose between these methods, to combine them or to opt not to use any system of recording.

The Learning Statement

Learning Statements express what a learner can do as the result of a learning experience – in this case mentoring. They will be expressed at quite different levels according to the position of the mentee, but should cover:

- A brief description of the mentoring process.
- The objectives that the mentee sought to achieve as a result of mentoring.
- Any changes to these objectives during the period.
- A summary of what the mentee actually did, to include both planned activities and others that may have emerged during the mentoring period
- Any hard, technical, skills used an/or learned during mentoring (examples might be key-board or other IT skills)
- The softer skills of social interaction and personal self-appraisal learned during mentoring (varying from time-keeping and time-management, through objective-setting to face-to-face communication).
- An indication of the range of tasks that the mentee feels able to undertake as the result of the learning that has taken place.

The length of the Learning Statement will vary according to the individual case, perhaps normally within the range of one to three A4 pages. Work towards the development of a Learning Statement would be a useful element in any mentoring programme.

The Portfolio

The Portfolio provides a full set of evidence about the mentoring process and the mentee's achievements. Its form and content could vary according to the programme and the particular needs of the mentee.

Core ingredients

1. Summary description (written and owned by promoter) of the nature of the mentoring programme, covering:
 - Duration
 - Purpose
 - Mentee/mentor roles
 - Requirements (or tasks) of mentee
2. An optional statement, prepared jointly by the mentee and mentor, explaining any particular features that might be specific to their mentoring arrangement

3. The mentee's objectives (this could be the plan agreed between the mentee and mentor, or might be an adaptation of it, with any confidential material taken out; it is owned by the mentee, although the mentor will have supported the preparation of the original version and the promoter may help in any adaptation for the portfolio)
4. The mentee's statement of outcomes/achievements – following European CV categories.
 - It would probably be produced through an interview using some sort of loose questionnaire. Mentees are likely to need help to recognise and state what they have learned (even though they will have made some progress in this through the mentoring process).
 - It could be in the form of a video or a sound recording, if this is more practical than a written text.
 - It should include some sense of the 'before' and 'after' – to provide an indication of what the added value has been.
 - But it must be owned by the mentee - the mentee makes the final decision about what is included.
5. An evaluation by the promoter, stating that the mentee has followed the requirements of the programme and providing some confirmation of the mentee's statement of achievements. The evaluation would be owned by the promoter – although it should be produced in consultation with the mentee. Here are some possible questions the evaluator might address:
 - Has the mentee participated fully in the process (kept appointments etc.)?
 - Can I identify particular achievements by the mentee during the mentoring process?
 - Is the mentee's self-evaluation consistent with my knowledge of her/his progress?
6. A formal certificate of 'Satisfactory Completion' should be provided.

Possible extra items

1. Examples of any work produced, selected by the mentee (*owned by mentee*)
2. A reflective diary – although this would probably not be for external scrutiny. We should remember that the portfolio has two purposes – as a record of achievement for the mentee, as well as a demonstration of achievement.
3. Where do I go next? A statement of the mentee's plans for future personal development.

Format of the portfolio

1. Traditionally portfolios are in hard copy – recently the trend has been towards e-portfolios. Both should be acceptable.
2. A key feature is that, overall, the portfolio is the property of the mentee – so it must be in a format to which the mentee has access.
3. The portfolio does not need to be in a single format – some parts could be on paper, others online or in alternative formats.

Case studies to be added

Relevant Sources

1. The Employers forum on age - <http://www.efa.org.uk/>
2. Taylor, Philip, "Global ageing - meeting the business challenges," prepared for the symposium: An Ageless Workforce - Opportunities for Business, Sydney, Australia, 27 August 2003.
3. Bongaarts, J. (2004). Population Aging and the Rising Cost of Public Pensions. *Population Studies*, № 30(1), 1-23
4. Vukovich, G. (1994). Economic and social implications of aging in Hungary. In: UNECE. Social aspects and country reviews of population aging. *Economic Studies* № 6, N.Y., pp. 179-194.
5. European Commission (2005). Europe's population in getting older. How will this affect us and what should we do about it? Brussels 17.03.2005, IP/05/322.
6. European Commission (2005). Faced with demographic change, a new solidarity between the generations ("Green Paper"). COM, № 94.
http://europa.eu.int/comm/employment_social/news/2005/mar/demog_gp_en.html
7. Eurostat. (2002). Labor Force Survey. Luxembourg, Office for Official Publications of the European Communities.
8. ACAS. A guide for Employers; Age and the workplace – putting the employment equality (age) regulations into practice -
http://www.stop-discrimination.info/fileadmin/pdfs/Europ_ische_Inhalte/Press_Dossier_PDFs/age/Age_and_the_Workplace_1_.pdf
9. Age discrimination - FAQs for employers
<http://www.acas.org.uk/index.aspx?articleid=1045>
10. ACAS. Age and the work place -
http://www.acas.org.uk/media/pdf/2/5/Age_the_workplace.pdf
11. Sarah Harper, 2006, *Aging Societies: Myths, Challenges and Opportunities*.
12. Harold Conrad, Viktoria Heindorf, and Franz Waldenberger "Human Resource Management in Aging Societies", 2007
13. Bonnie Lou Fatio. *AgeEsteem: Growing a Positive Attitude Toward Aging*, 2007