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The Code of Practice for Mentoring

Validating Mentoring 2



A new edition providing a full self-assessment process and a toolkit of systems to enable the use of external verification as part of a 'Blended self-assessment model'

www.vm2-project.eu

THE CODE OF PRACTICE FOR MENTORING

*A new edition providing a full self-assessment process
and a toolkit of systems to enable the use of external
verification as part of a 'Blended self-assessment model'*

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PART 1.

Introduction: the Assessment process

1. Who is this Code of Practice (CoP) for?

- This CoP is primarily aimed at you as managers and developers of mentoring programmes. It will help you to critically review your systems and how they work, while also helping you to improve their quality and/or gain external recognition.
- It will be very useful to those planning new mentoring programmes, through the advice about good practice that it provides and by the links it offers to other resources. But such first-time developers are not its main target audience.
- The CoP is also designed for use by the staff of organisations that provide mentoring programmes. Indeed, an important principle of our approach is that as many of the staff team as possible will participate in the self-assessment process. By contributing to the process staff will bring their own knowledge and expertise and learn from their colleagues while helping to improve their own practice and the performance of the programme overall.
- This CoP does not address all types of programmes that sometimes are called 'mentoring' (see pp3-4 for guidance about the nature of 'mentoring'). It has been developed initially to meet the needs of 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. Though the CoP may have limited applicability to mentoring programmes of this kind, it should still provide some useful guidance and valuable stimulus for self-reflection. The crucial first step,

as for all mentoring programmes, is to carefully consider and define the particular goals of the programme and to understand the particular requirements that such goals impose.

- We welcome feedback on the CoP. Please send any comments to **info@marie-curie-bg.org** or complete the feedback form, included with this package.

2. To whom does the CoP belong?

- The CoP itself is the property of the partners in the Leonardo da Vinci projects in which it has been developed so please respect the terms of the Copyright Statement above.
- If you carry out the Self-Assessment Process for your own programme, **your work in completing the self-assessment belongs to you**. You can decide how you want to use it and to whom, if anyone, you reveal the result. The purpose of the CoP is to help **you** to improve **your** own mentoring programme.
- You will best achieve these results by completing the process as openly and honestly as possible. You can't solve problems that you don't recognise.

3. How does this Code of Practice help its users?

- **The Good Practice in Mentoring** sections provide general guidance about each major aspect of mentoring and will be useful to both new and experienced promoters.
- In the **Self-Assessment Process** section we will take you through a thorough analysis of the operation of your programme, advising you on how to carry out the assessment as well as setting key questions that you should answer.
- Evaluation is often more authoritative if self-assessment is supported by an element of external verification, but this can be expensive, intrusive and difficult to arrange; **the Toolkit on External Verification** will help you to choose

options that will work best for your programme.

- The way in which you use the Code of Practice is up to you. You may choose an approach based purely on self-assessment or you may, drawing on the advice provided in the Toolkit, develop an approach that 'blends' self-assessment with a measure of external verification.
- The annexes provide you with some human stories showing the benefits that real participants have gained from mentoring, as well as showing how our approach to mentoring contributes to some major goals of the European Union in relation to education and training.

4. What is mentoring? A brief summary

- A useful overall definition of mentoring 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*). Mentoring has been found to be effective in helping disadvantaged people develop the abilities to meet a wide variety of challenges associated with normal social life. Enhancing employability is a common theme, but it is just one of the many challenges addressed within mentoring programmes.
- As will be seen from the list which follows, mentoring shares some features with other forms of supportive social interaction, such as friendship and student-centred teaching, but at the same time it is quite distinct from them.
- In more detail, some of the normal features of mentoring can be listed as follows:
 - It is a relationship involving regular meetings between the mentor and mentee, although the frequency and duration of the meetings can vary considerably.
 - Mentoring is a mechanism for sharing experience between two parties – a two-way street – with

benefits for both players.

- It is voluntary and informal, not compulsory and highly regulated.
- But it is goal-oriented and agreeing these goals is a key early objective in the mentoring process.
- It is an organised relationship: partners are selected, rather than meeting by chance.
- There is a co-ordinator who takes the lead role in matching partners and provides other support services.
- It is governed by an explicit agreement – although the content of this may change over the course of the relationship.
- Although some flexibility is generally allowed, the maximum and minimum duration of any mentoring relationship is normally specified in advance. It is confidential between the parties.
- Each partner must agree to the choice of the other and, although both will be expected to do their best to make the relationship work (mentoring is, after all, substantially about developing social skills), each must have the option to withdraw if it fails.
- It must serve mentee-needs and these must be properly identified, not simply taken-for-granted.
- It is a learning process – 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])

5. What are the benefits of mentoring?

- Experience suggests that good mentoring programmes can significantly improve the social and personal skills of

participants, building up their resources of the 'soft skills' that are crucial for employment. It is also very important that the benefits are not restricted to the mentee: mentors also gain from mentoring.

- 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>

- Not all mentoring programmes work well. To achieve the best results for the people involved (who are often among the most vulnerable) it is essential that programmes aim to achieve best practice. This Code of Practice will support you in reaching this goal.

PART 2.

Good practice in mentoring

Some preliminary points about your programme

Define your objectives

Different mentoring programmes often have some shared goals. For example they typically aim to develop the self-confidence and self-awareness of mentees. Other objectives may differ radically: some may be concerned with increasing employability, others with reducing the probability of involvement in crime. Some goals will relate to outcomes, for example did the mentees develop specific expected life skills; others will be operational, for example were the target numbers of mentoring pairs reached and how many satisfactorily completed the whole mentoring cycle?

The essential requirement is that all mentoring programmes should have very clearly defined objectives. 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.

Of course the importance of knowing your objectives, and ensuring that all involved fully understand them, goes beyond self-assessment. Indeed, without such awareness it is difficult to see how any effective mentoring programme could function effectively.

Section 1 Recruitment

An active recruitment campaign is almost always necessary for a successful 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 (for example employer, teacher or 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 gain employment very quickly, some may 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 and the need for care in selection and screening (see Section 2, Managing Risks and Challenges). The timing of recruitment is important – there is little point in trying to recruit students, for example, in the middle of holiday or exam periods. Also, it is very important to leave only 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

Mentoring is normally an extremely positive experience for both mentor and mentee. But occasionally it can pose risks to the health and well-being of participants. Although such events are rare it is important to plan to avoid them. Among the risk-factors are the following:

- Mentoring is a close relationship; it is often hard work and can place strains upon the psychological resources of both mentor and mentee.
- As a close, 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 but careful planning, monitoring and control can/will help prevent inappropriate behaviour.
- Mentoring often involves the participation – as both mentors and mentees – of people who come from socially disadvantaged backgrounds. For example homeless people, who may have a history of drug-use or alcoholism. This can increase the chance of problems arising.

All risks can be minimised with careful planning, effective monitoring and good support systems, so any well-organised mentoring programme should incorporate risk management into its basic design. The promoters of a programme that do not take this into account could put themselves at serious legal risk should something go wrong.

In some countries those working with vulnerable people have to be checked to confirm that they do not have a background that should bar them from taking such responsibility. For example, in the UK, potential mentors for young mentees, or those with learning difficulties, must be subject to a criminal record check. You should

confirm whether there is any equivalent in your country.

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 participant to have the same person as their monitoring contact throughout so that they will feel secure in approaching that individual if a problem arises.

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. To achieve successful matching you must ensure that, as part of the recruitment process, you gather as much information as possible about the interests, expertise and attitudes of mentors and mentees.

It is however essential that expectations are not unrealistic. Mentees must not be encouraged to think that mentoring will solve every problem they may confront and mentors should not see themselves as a combination of psychologist, priest and teacher.

The role of the mentor is to provide support and guidance in response to the mentees recognition of their own needs. Their role is to help the mentee to develop her/his own skills and competences, not normally to provide detailed instruction in the performance of technical tasks. Even if the mentoring is employment-related, the challenges to be dealt with may be more about attitudes to work and acquiring the basic approaches conducive to holding down a job than about technical expertise. So you may not need to find a mentor who is a technical expert in the same field as the one that the mentee aspires to enter. The matching process should reflect this flexibility.

Sometimes, of course, an element of teaching may be appropriate in mentoring. For example in the Leonardo da Vinci "Adult Mentoring" project (www.adults-mentoring.eu), many older mentees wanted to learn IT skills and this provided the incentive to draw them into mentoring relationships that also provided

many softer skills related to employability. Your arrangements for matching must reflect the nature of your programme.

Sometimes the information needed for successful matching can be difficult to identify and evidence may be unclear. You therefore may want to think about corroboration, for example 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 formal evidence.

Face-to-face contact is generally a valuable part of the matching process. Interviews during the recruitment and training processes will provide valuable information and often an informal first meeting between mentor and mentee, before the formal process begins, can provide an important stepping-stone towards a successful mentoring relationship.

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.

At an appropriate point in the training process participants should be required to sign an Agreement to confirm formally 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. (See the next section for more about Agreements.)

It can be helpful to encourage mentors and mentees to recognise the boundaries of their normal interaction and to understand the need for sensitivity 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 character 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*' would be OK, 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 an 'Action 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.
 - A regular monitoring process that provides active confirmation that the relationship is working well is an important way of minimising the risks inherent in mentoring. There are all sorts of reasons that could make mentors and mentees reluctant to 'make a fuss', so it would be wrong to rely purely on them to report problems.
 - 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 how the participants conducted the mentoring relationship 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 challenges as dealt with above, except, of course, that confidential information about individual mentees or mentors must not be 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: it can easily interfere with the operation of the mentoring relationship. Assessment must not prejudice the success of that which is being assessed.

However, mentoring programmes frequently award a certificate to mentees, and often mentors, recording their successful participation. The Validating Mentoring project has sought to go beyond this to explore the practicality of recognising the learning achievements of mentees in a way that is consistent with European policy on the validation of non-formal learning. It builds on three core principles:

- The approach to validation should give every mentee the opportunity to achieve recognition for the learning outcomes that he or she has achieved.
- 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.

It is very unlikely that the learning outcomes achieved through

mentoring will be readily measured through examinations or other formal procedures. But mentoring programmes can play an important role in identifying the learning that mentees have achieved. When the outcomes of mentoring are evaluated for future employment or training it will normally be part of an overall APEL (Accreditation of Prior Experience or Learning) procedure. Normally APEL professionals will be unlikely to accept a certificate recording the achievements of a mentee without supporting evidence. The target of the proposals here is to provide the best evidence possible without prejudicing the mentoring process.

So in this section of the CoP a specific model for validation is advanced. The questions that follow in the Self-Assessment Process enable the user to review three main issues:

- Whether the model proposed below has been adopted and, if so, how successful has it been?
- Whether an alternative model has been used and, if so, what are its features and what are the results of evaluating this experience?
- If neither of the above, why not? What have been the outcomes?

The purpose of validation

The development of systems for the validation of non-formal and informal learning is a core priority of the Leonardo da Vinci programme and it is a key reason why the Validating Mentoring projects have been funded. This reflects wider policy priorities at European level concerned with properly recognising the achievements of those whose learning has taken place in non-formal and informal settings.

The validation of non-formal and informal learning enables the achievements of learners (mentees, in this case) 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. 'Validation', the demonstration that learning has taken place, requires processes that can have other important benefits for mentees.

- The validation process requires and enables 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.
- It also enables 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.
- Finally, and not of least importance, the process encourages reflection by learners on their own learning and to consider the future options that may be open to them.

Despite these potential 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 (see below for an explanation of these terms).

Some 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. Programmes should not decide against offering a validation process without carefully considering the arguments in favour of at least a partial form of validation. Evidence of this consideration should be

presented in the Statement of Self-Assessment.

Our approach to the validation of learning outcomes embodies the principles of both the Common European Principles for the Validation of Non-Formal and Informal Learning and the European Qualifications Framework (EQF) (see Annex 2 for more detail about this).

A note on the European Qualifications Framework (EQF)

European policy on the validation of non-formal and informal learning (mentoring can readily be seen as a type of non-formal learning) encourages the use of the EQF as a way of indicating the level of learning outcomes achieved. The EQF is designed to cover all types of learning, including the soft skills that are a particular feature of the achievements of mentees. So in principle it should be applicable to mentoring. Whether this is a practical possibility for your mentoring programme is a matter for you to judge. It may be very useful for a mentee to have a record that places his or her achievements on an internationally recognised scale. On the other hand some mentees may be disappointed if their achievements are ranked only at the lower end of the scale, and you may not have the practical resources required to make robust judgements that will be recognised externally.

Our model for the validation of learning outcomes

Central to our model is a commitment, wherever possible, to enable the mentee to draw on three straightforward ways of recording her/his learning achievements. It is a practical expression of the task of 'identification' as expressed in guidance about the validation of non-formal learning. Reliable identification of learning achievements provides a basis for the wider recognition, and

possibly even, certification of these achievements.

A simple CV

First, s/he may choose to compile a simple CV. We recommend the use of the Europass CV¹ because it has European recognition and allows the user to select suitable parts and drop others (for example, the full CV covers skills in foreign languages, which will be quite inappropriate for many mentees). The Europass CV is designed to allow other materials to be added to it. We recommend that mentoring programmes offer mentees the opportunity to produce a simple Learning Statement recording their achievements and, where appropriate, a portfolio that offers direct evidence and products that demonstrate the learning outcomes achieved. Either or both can be added to the Europass CV. But remember: the mentee must be free to choose between these methods, to combine them, or to opt not to use any one of them. (See <http://europass.cedefop.europa.eu> for more information about the Europass CV).

Whether individually or in combination, these methods will provide a valuable resource on which any later APEL procedures can draw. Each will enable and require the mentee to review and evaluate her/his achievements in a form that will make them accessible to an APEL evaluator and will therefore be available as a basis for discussion and evaluation. Clearly, if the mentee opts to develop a portfolio, it will provide a far richer resource of evidence about her/his progress and the context within which learning has taken place than the CV or the Learning Statement, but all will be useful in an APEL process. Each will require some participation by both the

¹ The Europass CV does not only focus on formal qualifications and work experience but also allows space for non formal or informal aspects as social competences, organisational skills and artistic talent. These fields can be used to point out skills which have been developed either in or outside school or other formal training. It can be downloaded at http://europass.cedefop.europa.eu/europass/home/hornav/Introduction.csp?loc=en_GB

mentor and staff from the promoter of the mentoring programme; nevertheless, they must ultimately remain the property of the mentee.

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 (the learner) actually did, to include both planned activities and others that may have emerged during the mentoring period.
- Any hard, technical, skills used and/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. In other words, if possible these achievements should be expressed as 'learning outcomes,' i.e. statements of what the mentee can do as a result of the mentoring experience.

The length of the Learning Statement will vary according to the individual, perhaps normally within the range of one to three A4 pages. Work towards the development of a Learning Statement can 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.

Typical contents of a portfolio

1. Summary description of the nature of the mentoring programme. This normally would be a standard statement for all participants, covering:
 - Duration.
 - Purpose.
 - Mentee/mentor roles.
 - Requirements (or tasks) of the 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. You should supply the mentee with a framework within which they can structure their answers.
 - 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 recording 'Satisfactory Completion' of the mentoring process should be provided.

Possible extra items for the portfolio

1. Examples of any work produced, selected by the mentee (*note: it is important that the mentee's ownership of their work is recognised and so their approval must always be obtained for its external use*).
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 for subsequent APEL.
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. (But if so, a clear explanation must be provided to enable an APEL evaluator to make full use of all the evidence.)
4. If it is to be used in a prospective APEL process (explicit or otherwise, as in support of a job-application) it must be readily accessible to, and usable by, the APEL evaluator. This may influence the choice of format in which the portfolio is presented.

PART 3.

The self-assessment process

Preliminary advice

1. The Code of Practice for Mentoring is a self assessment package to help you, as a mentoring promoter, to ensure that your programme reaches the highest possible quality in design and delivery. Its contents were thoroughly tested in the original 'Validating Mentoring' project.
2. The Self-Assessment Package will produce unique and valuable outcomes for you as a user. In particular, it will provide:
 - A thorough, structured, review of all major aspects of the programme.
 - A systematic summary of the strengths and weaknesses of the programme based on your own appraisal.
 - An action-plan for the improvement of the programme, again based on your own appraisal.
3. The package is designed to produce these outputs automatically and confidentially. So the information that you provide will remain your own property and will not be disclosed to others.
4. To produce these very substantial outcomes requires an appropriate input from you. What you get out will depend upon what you have put in. So be prepared to commit several hours in order to collect and prepare the material, while you should foresee at least 1 hour for the online package.
5. You will find it helpful to work through the 'Good Practice in Mentoring' and the 'Toolkit for External Verification' before completing the self-assessment. Please follow this

link (<http://www.vm2-project.eu/elearning/bounce.php?course=2>) to access the e-learning platform where we have made this available for you. Registration is optional. These will help you to reflect upon your own practices and to identify issues you may want to highlight in the self-assessment.

Completing the self-assessment

1. All entries must be made at a single sitting. So careful preparation is important.
2. Make sure that you begin by carefully reading the PDF version of the package (<http://www.vm2-project.eu/vm2-coptool/docs/en.pdf>) so that you are then able to ensure that you have everything you need when you come to the self-assessment.
3. You will probably need help from your colleagues in completing the package, so it will be wise to include full consultation with your whole team as part of your preparations.
4. You may find it helpful to prepare beforehand material that you can then paste into your self-assessment. This can save a lot of time in completing the form and lead to a higher quality answer.
5. You will be asked, in relation to each aspect of mentoring, whether there are issues on which you plan to take action to change your practices. You will find it helpful to review such possibilities beforehand.
6. Section 1 of the Self-assessment Process asks you to consider overall aspects of your mentoring programme. Some issues might also be relevant to Section 2 and it may be best if you

cross-refer to these items, instead of repeating the same material.

7. Section 2 deals with specific aspects of the mentoring process, following the structure in 'Good Practice in Mentoring'.
8. Section 3 encourages you to draw your results together into a full 'Statement of Self-Assessment' and summarises your conclusions into action-plans for the future.
9. Some of the individual questions ask you about several related aspects of your programme. This is deliberate, as to ask about each issue separately would extend the process unreasonably. You will find the outcomes most useful if you answer these questions as fully as possible.
10. Similarly there are other questions that can be answered with a simple 'Yes' of 'No'. If you don't have anything to add, this is OK. But often such questions will provoke deeper thoughts and you will find it helpful to add any such comments to your answers.
11. How you use the outcomes of the Self-Assessment is up to you. You may wish to retain it for purely internal use as a basis for maintaining and improving the quality of your programme. But you may find it helpful in obtaining external recognition for the value of what you do. In either case please tell us (link to contact form of VM2) about your experiences. We can only improve the package on the basis of feedback from users.

**STEP 1:
Details about you and your programme**

Title of your mentoring programme *	
Organisation name *	
Country *	
Address *	
Contact name *	
Valid e-mail address * (this must be entered as it will be used to send you the consolidated report afterwards)	
Target group:	<ul style="list-style-type: none"> ● People with Disabilities ● Offenders ● Ex-prisoners ● Young people ● Women ● Low skilled and qualified people ● Long unemployed ● Older people ● Other (please specify)
Goal of the mentoring programme	

*** Obligatory field**

CONFIDENTIALITY CLAUSE:

The information you supply in completing the Self-assessment Process will be used for the purposes of analysis and review within the Leonardo da Vinci project 'Validating Mentoring 2'. Your responses will not be retained after the end of the project other than for the purposes of audit within the Leonardo da Vinci programme. We will not disclose specific content to any organisation outside the project partnership without your specific permission and we will ensure that any use we make of its content will be managed so as to protect your identity.

I have read and accepted the above.

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SECTION 1

STEP 2: Theme 1.1 Overall issues

1. What are the aims and objectives of our programme?
Please note that the answers to the questions asked here belong to you. The wording of the questions is designed to emphasise this through the use of the words 'we' and 'our' instead of 'you' and 'yours'.

- Please include a summary of formal statements of your aims and objectives (if these are available) but please add any informal objectives if these are useful in clarifying the programme.

2. How will we know if we have achieved our aims and objectives?

- Do we have explicit performance indicators? If so, what do they show about our achievements and areas for improvement?

3. Have there been any significant changes in the operation of your mentoring programme in the last year? If so:
- What were the objectives of the change?
 - Is there evidence about its success/appropriateness?

4. Are we planning any changes in our programme for the next cycle of mentoring? If so:
- What are we aiming to achieve?
 - What impact do we expect on the achievement of our aims and objectives?

5. Is the completion of this self-assessment part of a continuing process of review? If so:
- How frequently do we review our programme?
 - How do we ensure that there is a continuing cycle of improvement from one review to the next?

6. Does our assessment 'blend' self-assessment with any element of external input? If so describe our blended approach in the review process.

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SECTION 2

STEP 3: Theme 2.1 Recruitment

1. What targets have we set for the recruitment of mentors and mentees? How did we decide these targets?

2. What is our recruitment strategy and how did we decide it?

3. What are the targets of our recruitment strategy?

4. What would we do if we fall short of our initial recruitment targets? Is our recruitment strategy flexible enough to allow adjustments if we don't achieve our initial recruitment targets?

5. Are we confident that our application form gathers all the information we need for risk-management, training and matching of mentors and mentees? Please add any relevant information in support of the answer:

6. Does our recruitment material provide a realistic and accurate picture of the commitments required from mentors and mentees? Please give a brief explanation:

7. Have we identified any of the following areas for action in relation to our work in this aspect (recruitment) of mentoring?

	List of specific cases in our work
Cases where action is required to remedy known problems	1. _____ 2. _____ 3. _____ 4. _____
Areas for special monitoring in case problems arise	1. _____ 2. _____ 3. _____ 4. _____
Cases where action is planned to build on success or to make the programme more robust	1. _____ 2. _____ 3. _____ 4. _____

8. How do we rate our performance in this aspect (recruitment) of mentoring?

CHOOSE ONE	OUR RATING	Score
Excellent throughout this aspect of mentoring		5
Good overall, but we have identified a few issues where we know how to improve our results in this aspect of mentoring		4
OK on the whole, but we have identified a significant number of issues where we know we should improve our results in this aspect of mentoring		3
OK only in some respects, and there are several areas that limit the full effectiveness of this aspect of mentoring		2
We know we have a lot to do to improve our results if we are to be fully effective in this in this aspect of mentoring		1

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**STEP 4: Theme 2.2
Managing risks and challenges**

1. Have we carried out a proper risk analysis? This should identify the specific ways in which our programme seeks to control and minimise risks, in particular addressing any risks that may derive from any distinctive features of our programme, such as the nature of the client group and the locations in which mentoring takes place.
 - Can we provide examples to show how we have planned for any specific risks that may arise in our programme?

2. How have we recorded the process and outcomes of this risk analysis and what systems do we have for its review and updating in response to changing circumstances?

3. How do our recruitment, selection and training processes seek to limit the risks to mentees and mentors?

4. In what ways do our monitoring procedures encourage participants to raise any emerging questions or concerns before they become serious?

5. If problems arise:

- Do we have fast and effective ways of taking action?

- Have our staff been adequately prepared?

- Do they know how to get support or specialist advice, if this should be necessary?

6. Has the mentor selection procedure been adequately monitored and followed up? Please give a brief explanation:

7. Have we identified any of the following areas for action in relation to our work in this aspect (managing risks and challenges) of mentoring?

	List of specific cases in our work
Cases where action is required to remedy known problems	1. _____ 2. _____ 3. _____ 4. _____
Areas for special monitoring in case problems arise	1. _____ 2. _____ 3. _____ 4. _____
Cases where action is planned to build on success or to make the programme more robust	1. _____ 2. _____ 3. _____ 4. _____

8. How do we rate our performance in this aspect (managing risks and challenges) of mentoring?

CHOOSE ONE	OUR RATING	Score
Excellent throughout this aspect of mentoring		5
Good overall, but we have identified a few issues where we know how to improve our results in this aspect of mentoring		4
OK on the whole, but we have identified a significant number of issues where we know we should improve our results in this aspect of mentoring		3
OK only in some respects, and there are several areas that limit the full effectiveness of this aspect of mentoring		2
We know we have a lot to do to improve our results if we are to be fully effective in this in this aspect of mentoring		1

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**STEP 5: Theme 2.3
Matching mentees and mentors**

1. What criteria do we use to decide whether a match is appropriate?
 - How (and how clearly) are these criteria explained to mentors and mentees?
 - How do these criteria link to the screening required for our safety strategy?

2. How do we gather information from the mentee and the mentor?
 - Can we show that it is effective in getting the information we need?
 - How do we establish that the information we gather is reliable?

3. How can we demonstrate that the process is:
 - User-friendly?
 - Transparent?
 - Confidential?
 - Reasonably speedy?

4. Does the process give both parties a fair chance to express their preferences? Please give a brief explanation:

5. Is there an opportunity for either party to reject the proposed match if they feel it is inappropriate, either because of individual factors such as a personality clash or because the parties don't believe that their partnership will be fruitful?

6. How do we deal with matches that turn out to be unsuccessful?

7. Do we have sensitive and professional ways to debrief potential participants for whom we have not been able to find partners? Please give a brief explanation:

8. Have we identified any of the following areas for action in relation to our work in this aspect (matching mentees and mentors) of mentoring?

	List of specific cases in our work
Cases where action is required to remedy known problems	1. _____ 2. _____ 3. _____ 4. _____
Areas for special monitoring in case problems arise	1. _____ 2. _____ 3. _____ 4. _____
Cases where action is planned to build on success or to make the programme more robust	1. _____ 2. _____ 3. _____ 4. _____

9. How do we rate our performance in this aspect (managing risks and challenges) of mentoring?

CHOOSE ONE	OUR RATING	Score
Excellent throughout this aspect of mentoring		5
Good overall, but we have identified a few issues where we know how to improve our results in this aspect of mentoring		4
OK on the whole, but we have identified a significant number of issues where we know we should improve our results in this aspect of mentoring		3
OK only in some respects, and there are several areas that limit the full effectiveness of this aspect of mentoring		2
We know we have a lot to do to improve our results if we are to be fully effective in this in this aspect of mentoring		1

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STEP 6: Theme 2.4

The induction and training of mentors and mentees

- Can we show that all our promotional materials give an accurate impression of the nature of mentoring and of our programme in particular? Please give a brief explanation:
- Does the initial guidance that we provide to mentors and mentees give an accurate understanding of the responsibilities and commitments that are required of them? Please give a brief explanation:
- In terms of the structure and format of training, how can we show that:
 - The overall duration is appropriate for our target users and for the purposes to be achieved through mentoring?

- There is a clear rationale for the balance between face-to-face contact and distance learning material? Answer only if distance learning material is used and please give a brief explanation:

- All teaching materials are provided in forms that are best usable by our target groups (including availability in alternative formats if disabled users require this)? Please comment briefly on your answer:

- Our mentors and mentees learn to adapt their individual arrangements to meet their particular needs.

4. How can we show that the training package provides appropriate training and practice in the core skills of mentoring, such as listening, responding, target-setting and reviewing progress?

5. Does our training package provide an overall reference guide, designed to meet their needs and abilities that mentors and mentees can continue to use during the mentoring period? Explain how this is achieved.

6. If not, what other systems do we have for providing continuing guidance?

7. By what criteria do we know if a prospective mentor or mentee has successfully completed their training requirements?

8. How do we explicitly obtain and record the participants' agreement to the operational principles of the programme? (See also Section 5.)

9. Have we identified any of the following areas for action in relation to our work in this aspect (the induction and training of mentors and mentees) of mentoring? (If 'yes' please list in the box below)

	List of specific cases in our work
Cases where action is required to remedy known problems	1. _____ 2. _____ 3. _____ 4. _____
Areas for special monitoring in case problems arise	1. _____ 2. _____ 3. _____ 4. _____
Cases where action is planned to build on success or to make the programme more robust	1. _____ 2. _____ 3. _____ 4. _____

10. How do we rate our performance in this aspect (the induction and training of mentors and mentees) of mentoring?

CHOOSE ONE	OUR RATING	Score
Excellent throughout this aspect of mentoring		5
Good overall, but we have identified a few issues where we know how to improve our results in this aspect of mentoring		4
OK on the whole, but we have identified a significant number of issues where we know we should improve our results in this aspect of mentoring		3
OK only in some respects, and there are several areas that limit the full effectiveness of this aspect of mentoring		2
We know we have a lot to do to improve our results if we are to be fully effective in this in this aspect of mentoring		1

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STEP 7: Theme 2.5
Target-setting and agreements
between the mentee and the mentor

You will remember that two different types of Agreements were identified in the Good Practice section; the first concerns overall operational rules and procedures and the second is about aims and objectives and the specific goals of the mentee and mentor.

In connection with the first type (overall operational rules and procedures), you will find it helpful to consider the following questions:

1. How do we ensure and record the fact that the participants have explicitly agreed on the following issues?
 - The need to participate in the selection and screening process
 - The importance of following the programme's rules about confidentiality
 - Acceptance of the programme's data protection procedures
 - Their willingness to participate fully in the programme's monitoring procedures
 - Their full recognition of, and agreement to, their joint responsibility for the operation of the mentoring relationship

2. How does our approach to the Agreement between the mentor and mentee enable (and support) them in defining and recording their agreement about issues such as the duration, frequency and location of mentoring meetings?

3. Does our approach to the Agreement require participants to agree procedures in case things go wrong? Please provide examples

In connection with the second type (aims and objectives and the specific goals of the mentee and mentor), you will find it helpful to consider the following questions:

4. How does our approach to the Agreement make it clear that the ultimate responsibility for setting the objectives of the particular mentoring relationship lies with the mentee, but that also the mentor will have approved and supported these objectives?

5. How does the training we have provided give adequate support for the tasks that mentors and mentees have to perform in reaching this agreement?

6. Does the Mentoring Agreement encourage participants to express their objectives in ways that are clear and achievable within the life of the project? Please illustrate with examples

7. How does the Agreement encourage them continually to review and record progress being made towards the agreed objectives and to assess whether these objectives have been achieved?

8. In what ways does the Agreement recognise the possibility of unanticipated beneficial outcomes, and that a mentoring relationship may be successful even if the original objectives are not achieved?

9. Have we identified any of the following areas for action in relation to our work in this aspect (target-setting and agreements between the mentee and the mentor) of mentoring?

	List of specific cases in our work
Cases where action is required to remedy known problems	1. _____ 2. _____ 3. _____ 4. _____
Areas for special monitoring in case problems arise	1. _____ 2. _____ 3. _____ 4. _____
Cases where action is planned to build on success or to make the programme more robust	1. _____ 2. _____ 3. _____ 4. _____

10. How do we rate our performance in this aspect (target-setting and agreements between the mentee and the mentor) of mentoring?

CHOOSE ONE	OUR RATING	Score
Excellent throughout this aspect of mentoring		5
Good overall, but we have identified a few issues where we know how to improve our results in this aspect of mentoring		4
OK on the whole, but we have identified a significant number of issues where we know we should improve our results in this aspect of mentoring		3
OK only in some respects, and there are several areas that limit the full effectiveness of this aspect of mentoring		2
We know we have a lot to do to improve our results if we are to be fully effective in this in this aspect of mentoring		1

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**STEP 8: Theme 2.6
Monitoring and evaluation**

1. How can we be confident that our monitoring adequately covers all aspects of the mentoring process?

2. How can we show that the monitoring process captures all significant changes and helps the programme to adapt to unanticipated developments?

3. Does our monitoring programme also gather subjective feedback about project progress and achievements? Please give a brief explanation:

4. Are the monitoring and evaluation systems transparent both to external audiences and to mentees and mentors? Please give a brief explanation:

5. How can we be sure that the evaluation processes adequately covers the complete mentoring programme?

6. Is there any external evaluation of our programme? If so how does it relate to internal evaluation and, if not, is there any mechanism to ensure the independence and reliability of our overall evaluation?

7. Have we identified any of the following areas for action in relation to our work in this aspect (monitoring and evaluation) of mentoring?

	List of specific cases in our work
Cases where action is required to remedy known problems	1. _____ 2. _____ 3. _____ 4. _____
Areas for special monitoring in case problems arise	1. _____ 2. _____ 3. _____ 4. _____
Cases where action is planned to build on success or to make the programme more robust	1. _____ 2. _____ 3. _____ 4. _____

8. How do you rate your performance in this aspect (monitoring and evaluation) of mentoring?

CHOOSE ONE	OUR RATING	Score
Excellent throughout this aspect of mentoring		5
Good overall, but we have identified a few issues where we know how to improve our results in this aspect of mentoring		4
OK on the whole, but we have identified a significant number of issues where we know we should improve our results in this aspect of mentoring		3
OK only in some respects, and there are several areas that limit the full effectiveness of this aspect of mentoring		2
We know we have a lot to do to improve our results if we are to be fully effective in this in this aspect of mentoring		1

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STEP 9: Theme 2.7
The validation of learning outcomes

1. Do we provide our mentees with a certificate recording their participation in the programme? Please identify the main features of your certificate.

- Please identify any evidence to show that the certificate is useful to mentees after the end of the mentoring period.

2. Do we seek to recognise the learning outcomes achieved by our mentees?

- YES (Go to question 3)
- NO (Go to question 8)

3. If we use the Europass CV:

- Please explain any relevant training provided for mentees and mentors.

- What proportion of our mentees take advantage of this opportunity?

- Can we evaluate the value of the Europass CV to your mentees? If so, please explain the conclusions.

4. If we use any other model of CV:

- Please explain any relevant training provided for mentees and mentors

- What proportion of our mentees take advantage of this opportunity?

- Can we evaluate the value of the Europass CV to our mentees? If so, please explain the conclusions.

5. If we offer our mentees the opportunity to produce a learning statement:

- Please explain any relevant training provided for mentees and mentors.

- What proportion of our mentees take advantage of this opportunity?

- Can we evaluate the value of the learning statement to our mentees? If so, please explain the conclusions.

6. If we offer our mentees the opportunity to produce a Portfolio:

- Please explain any relevant training provided for mentees and mentors.

- What proportion of our mentees take advantage of this opportunity?

- Can we evaluate the value of the Portfolio to our mentees? If so, please explain the conclusions.

7. Do you use the EQF to identify the levels of learning outcomes achieved by your mentors? If so, please describe any issues that may have arisen in this process.

8. If we don't provide for the recognition of the learning outcomes of our mentees:

- Why have we made this decision?

- Do we consider that our mentees lose out as a result of our decision?

- Do we offer alternative evidence for future use about the performance of our individual mentees?

- On what basis is such evidence produced and what quality assurance procedures are applied to it?

9. Have we identified any of the following areas for action in relation to our work in this aspect (the validation of learning outcomes) of mentoring?

	List of specific cases in our work
Cases where action is required to remedy known problems	1. _____ 2. _____ 3. _____ 4. _____
Areas for special monitoring in case problems arise	1. _____ 2. _____ 3. _____ 4. _____

Cases where action is planned to build on success or to make the programme more robust	1. _____
	2. _____
	3. _____
	4. _____

10. How do we rate our performance in this aspect (the validation of learning outcomes) of mentoring?

CHOOSE ONE	OUR RATING	Score
Excellent throughout this aspect of mentoring		5
Good overall, but we have identified a few issues where we know how to improve our results in this aspect of mentoring		4
OK on the whole, but we have identified a significant number of issues where we know we should improve our results in this aspect of mentoring		3
OK only in some respects, and there are several areas that limit the full effectiveness of this aspect of mentoring		2
We know we have a lot to do to improve our results if we are to be fully effective in this in this aspect of mentoring		1

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**STEP 10: Theme 2.8
Teamwork**

Teamwork is very important in self-assessment, so please identify all those who are, or have been, involved in this self-assessment exercise.

Name	Position in our organisation	Role in process (if external)	Lead role in any area?	Other areas of contribution
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

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**STEP 11: Section 3
DRAWING OUR RESULTS TOGETHER, PRODUCING THE FULL STATEMENT
OF SELF-ASSESSMENT AND MAKING ACTION PLANS**

Your action plan

Area identified for action	What action will we take?	What are we seeking to achieve?	How will we judge the outcome?	When will we make the judgement?
Cases where action is required to remedy known problems				
Recruitment				
Entry 1				
Entry 2				
Entry 3				
Entry 4				

Area identified for action	What action will we take?	What are we seeking to achieve?	How will we judge the outcome?	When will we make the judgement?
Managing risks and challenges				
Entry 1				
Entry 2				
Entry 3				
Entry 4				
Matching mentees and mentors				
Entry 1				
Entry 2				
Entry 3				
Entry 4				

The induction and training of mentors and mentees				
Entry 1				
Entry 2				
Entry 3				
Entry 4				
Target-setting and agreements between the mentee and the mentor				
Entry 1				
Entry 2				
Entry 3				
Entry 4				

Area identified for action	What action will we take?	What are we seeking to achieve?	How will we judge the outcome?	When will we make the judgement?
----------------------------	---------------------------	---------------------------------	--------------------------------	----------------------------------

Monitoring and evaluation				
Entry 1				
Entry 2				
Entry 3				
Entry 4				
The validation of learning outcomes				
Entry 1				
Entry 2				
Entry 3				
Entry 4				

Areas for special monitoring in case problems arise				
Recruitment				
Entry 1				
Entry 2				
Entry 3				
Entry 4				
Managing risks and challenges				
Entry 1				
Entry 2				
Entry 3				
Entry 4				

Area identified for action	What action will we take?	What are we seeking to achieve?	How will we judge the outcome?	When will we make the judgement?
Matching mentees and mentors				
Entry 1				
Entry 2				
Entry 3				
Entry 4				
The induction and training of mentors and mentees				
Entry 1				
Entry 2				
Entry 3				
Entry 4				

Target-setting and agreements between the mentee and the mentor				
Entry 1				
Entry 2				
Entry 3				
Entry 4				
Monitoring and evaluation				
Entry 1				
Entry 2				
Entry 3				
Entry 4				

Area identified for action	What action will we take?	What are we seeking to achieve?	How will we judge the outcome?	When will we make the judgement?
----------------------------	---------------------------	---------------------------------	--------------------------------	----------------------------------

The validation of learning outcomes				
Entry 1				
Entry 2				
Entry 3				
Entry 4				

Cases where action is planned to build on success or to make the programme more robust				
Recruitment				
Entry 1				
Entry 2				

Entry 3				
Entry 4				
Managing risks and challenges				
Entry 1				
Entry 2				
Entry 3				
Entry 4				
Matching mentees and mentors				
Entry 1				
Entry 2				
Entry 3				
Entry 4				

Area identified for action	What action will we take?	What are we seeking to achieve?	How will we judge the outcome?	When will we make the judgement?
The induction and training of mentors and mentees				
Entry 1				
Entry 2				
Entry 3				
Entry 4				
Target-setting and agreements between the mentee and the mentor				
Entry 1				
Entry 2				
Entry 3				
Entry 4				

Monitoring and evaluation				
Area identified for action	What action will we take?	What are we seeking to achieve?	How will we judge the outcome?	When will we make the judgement?
The validation of learning outcomes				
Entry 1				
Entry 2				
Entry 3				
Entry 4				
The validation of learning outcomes				
Entry 1				
Entry 2				
Entry 3				
Entry 4				

**SAVE AND GO TO
PREVIOUS PAGE**

**PROCEED
TO NEXT PAGE**

SECTION 3

STEP 12: Theme 3.1 CONSOLIDATED RESULTS

This page provides an integrated presentation of the data that was supplied earlier. This report is also sent via e-mail.

Your overall issues

1. What are the aims and objectives of your programme?: *demo*
2. How will we know if we have achieved our aims and objectives?: *demo*
3. Have there been any significant changes in the operation of your mentoring programme in the last year?: *demo*
4. Are we planning any changes in our programme for the next cycle of mentoring?: *demo*
5. Is the completion of this self-assessment part of a continuing process of review?: *demo*
6. Does our assessment 'blend' self-assessment with any element of external input?: *demo*

Recruitment

1. What targets have we set for the recruitment of mentors and mentees? How did we decide these targets?: *demo*
2. What is our recruitment strategy and how did we decide it?: *demo*
3. What are the targets of our recruitment strategy?: *demo*
4. What would we do if we fall short of our initial recruitment targets? Is our recruitment strategy flexible enough to allow adjustments if we don't achieve our initial recruitment targets?:

demo

5. Are we confident that our application form gathers all the information we need for risk-management, training and matching of mentors and mentees?: *demo*
6. Does our recruitment material provide a realistic and accurate picture of the commitments required from mentors and mentees?: *demo*

Managing risks and challenges

1. Have we carried out a proper risk analysis?: *demo*
2. How have we recorded the process and outcomes of this risk analysis and what systems do we have for its review and updating in response to changing circumstances?: *demo*
3. How do our recruitment, selection and training processes seek to limit the risks to mentees and mentors?: *demo*
4. In what ways do our monitoring procedures encourage participants to raise any emerging questions or concerns before they become serious?: *demo*
5. Do we have fast and effective ways of taking action?: *demo*
6. Have our staff been adequately prepared?: *demo*
7. Do they know how to get support or specialist advice, if this should be necessary?: *demo*
8. Has the mentor selection procedure been adequately monitored and followed up, also ensuring that the extent of the reliability of the mentor is well-understood?: *demo*

Matching mentees and mentors

1. What criteria do we use to decide whether a match is appropriate?: *demo*
2. How do we gather information from the mentee and the mentor?: *demo*
3. How can we demonstrate that the process is user-friendly,

- transparent, confidential, and reasonably speedy?: *demo*
4. Does the process give both parties a fair chance to express their preferences?: *demo*
 5. Is there an opportunity for either party to reject the proposed match if they feel it is inappropriate, either because of individual factors such as a personality clash or because the parties don't believe that their partnership will be fruitful?: *demo*
 6. How do we deal with matches that turn out to be unsuccessful?: *demo*
 7. Do we have sensitive and professional ways to debrief potential participants for whom we have not been able to find partners?: *demo*

The induction and training of mentors and mentees

1. Can we show that all our promotional materials give an accurate impression of the nature of mentoring and of our programme in particular?: *demo*
2. Does the initial guidance that we provide to mentors and mentees give an accurate understanding of the responsibilities and commitments that are required of them?: *demo*
3. Are we confident that the overall duration of mentoring in our programme is appropriate for our target users and for the purposes to be achieved?: *demo*
4. Is there clear rationale for the balance between face-to-face contact and distance learning material? Answer only if distance learning material is used and please give a brief explanation: *demo*
5. Are all teaching materials provided in forms that are best usable by our target groups (including availability in alternative formats if disabled users require this)? Please comment briefly on your answer: *demo*
6. How are our mentors and mentees helped to adapt their individual arrangements to meet their particular needs?: *demo*

7. How can we show that the training package provides appropriate training and practice in the core skills of mentoring, such as listening, responding, target-setting and reviewing progress?: *demo*
8. Does our training package provide an overall reference guide, designed to meet their needs and abilities that mentors and mentees can continue to use during the mentoring period?: *demo*
9. If not, what other systems do we have for providing continuing guidance?: *demo*
10. By what criteria do we know if a prospective mentor or mentee has successfully completed their training requirements?: *demo*
11. How do we explicitly obtain and record the participants' agreement to the operational principles of the programme?: *demo*

Target-setting and agreements between the mentee and the mentor

1. How do we ensure and record the fact that the participants have explicitly agreed on the following issues?: *demo*
2. How does our approach to the Agreement between the mentor and mentee enable (and support) them in defining and recording their agreement about issues such as the duration, frequency and location of mentoring meetings?: *demo*
3. Does our approach to the Agreement require participants to agree procedures in case things go wrong?: *demo*
4. How does our approach to the Agreement make it clear that the ultimate responsibility for setting the objectives of the particular mentoring relationship lies with the mentee, but that also the mentor will have approved and supported these objectives?: *demo*
5. How does the training we have provided give adequate support for the tasks that mentors and mentees have to perform in reaching this agreement?: *demo*

6. Does the Mentoring Agreement encourage participants to express their objectives in ways that are clear and achievable within the life of the project?: *demo*
7. How does the Agreement encourage them continually to review and record progress being made towards the agreed objectives and to assess whether these objectives have been achieved?: *demo*
8. In what ways does the Agreement recognise the possibility of unanticipated beneficial outcomes, and that a mentoring relationship may be successful even if the original objectives are not achieved?: *demo*

Monitoring and evaluation

1. How can we be confident that our monitoring adequately covers all aspects of the mentoring process?: *demo*
2. How can we show that the monitoring process captures all significant changes and helps the programme to adapt to unanticipated developments?: *demo*
3. Does our monitoring programme also gather subjective feedback about project progress and achievements?: *demo*
4. Are the monitoring and evaluation systems transparent both to external audiences and to mentees and mentors?: *demo*
5. How can we be sure that the evaluation processes adequately covers the complete mentoring programme?: *demo*
6. Is there any external evaluation of our programme? If so how does it relate to internal evaluation and, if not, is there any mechanism to ensure the independence and reliability of our overall evaluation?: *demo*

The validation of learning outcomes

1. Do we provide our mentees with a certificate recording their participation in the programme? Please identify the main

features of your certificate.

- Please identify any evidence to show that the certificate is useful to mentees after the end of the mentoring period.: *demo*
2. If we use the Europass CV:
 - Please explain any relevant training provided for mentees and mentors.: *demo*
 - What proportion of our mentees take advantage of this opportunity?: *demo*
 - Can we evaluate the value of the Europass CV to your mentees? If so, please explain the conclusions.: *demo*
 3. If we use any other model of CV:
 - Please explain any relevant training provided for mentees and mentors: *demo*
 - What proportion of our mentees take advantage of this opportunity?: *demo*
 - Can we evaluate the value of the Europass CV to our mentees? If so, please explain the conclusions.: *demo*
 4. If we offer our mentees the opportunity to produce a learning statement:
 - Please explain any relevant training provided for mentees and mentors.: *demo*
 - What proportion of our mentees take advantage of this opportunity?: *demo*
 - Can we evaluate the value of the learning statement to our mentees? If so, please explain the conclusions.: *demo*
 5. If we offer our mentees the opportunity to produce a Portfolio:
 - Please explain any relevant training provided for mentees and mentors.: *demo*
 - What proportion of our mentees take advantage of this opportunity?: *demo*
 - Can we evaluate the value of the Portfolio to our mentees?

- If so, please explain the conclusions.: *demo*
- Do you use the EQF to identify the levels of learning outcomes achieved by your mentors? If so, please describe any issues that may have arisen in this process.: *demo*

6. If we don't provide for the recognition of the learning outcomes of our mentees:
- Why have we made this decision?: *demo*
 - Do we consider that our mentees lose out as a result of our decision?: *demo*
 - Do we offer alternative evidence for future use about the performance of our individual mentees?: *demo*
 - On what basis is such evidence produced and what quality assurance procedures are applied to it?: *demo*

Teamwork

Name	Position in our organisation	Role in process (if external)	Lead role in any area?	Other areas of contribution
<i>demo</i>	<i>demo</i>	<i>demo</i>	<i>demo</i>	<i>demo</i>
<i>demo</i>	<i>demo</i>	<i>demo</i>	<i>demo</i>	<i>demo</i>

Summary of your self-evaluation: action(s) for the future

[This table presents the total of the 7 scores collected before for recruitment, managing risks and challenges, matching mentees and mentors, the induction and training of mentors and mentees, target-setting and agreements between the mentee and the mentor, monitoring and evaluation, and the validation of learning outcomes.]

SUMMARY OF YOUR SELF-EVALUATION: ACTION FOR THE FUTURE	Score leading to this 'verdict'
Excellent in many respects but continue to ensure that you don't miss any opportunities for improvement	29 or over
Good in most areas although you have identified a few issues where you are aware that you should act to improve your performance. 1. You should particularly consider following aspects: • (list those with a score of 3) 2. You should take urgent action in relation to: • (list those with a score of 1 or 2) 1 and or 2 are only displayed if applicable.	22-28
Good in some areas, but you have identified a substantial number of issues where you know you must improve your results if you are to achieve the results that you expect. 1. You should particularly consider following aspects: • (list those with a score of 3) 2. You should take urgent action in relation to: • (list those with a score of 1 or 2) 1 and or 2 are only displayed if applicable.	15-21
OK in some respects, but there are a substantial number of issues where you must develop a co-ordinated plan, prioritising urgent action to improve the effectiveness of your mentoring programme. 1. You should particularly consider following aspects: • (list those with a score of 3) 2. You should take urgent action in relation to: • (list those with a score of 1 or 2) 1 and or 2 are only displayed if applicable.	8-14
You must develop and implement a full programme of urgent action across most aspects of your mentoring programme if it is to be properly effective.	7

Example:

OK in some respects, but there are a substantial number of issues where you must develop a co-ordinated plan, prioritising urgent action to improve the effectiveness of your mentoring programme.

You should particularly consider following aspects:

- Matching mentees and mentors
- Monitoring and evaluation

You should take urgent action in relation to:

- The induction and training of mentors and mentees
- Target-setting and agreements between the mentee and the mentor

Your action plan

Area identified for action	What action will you take?	What are you seeking to achieve?	How will you judge the outcome?	When will you make the judgement?
----------------------------	----------------------------	----------------------------------	---------------------------------	-----------------------------------

Cases where action is required to remedy known problems				
<i>Recruitment</i>				
demo	demo	demo	no data entered	no data entered
demo	demo	no data entered	demo	no data entered
demo	demo	no data entered	no data entered	demo
demo	demo	no data entered	demo	no data entered
<i>Managing risks and challenges</i>				
demo	demo	demo	no data entered	no data entered
demo	demo	no data entered	demo	no data entered
demo	demo	no data entered	no data entered	demo
demo	demo	no data entered	no data entered	no data entered
<i>Matching mentees and mentors</i>				
demo	demo	demo	demo	demo

Area identified for action	What action will you take?	What are you seeking to achieve?	How will you judge the outcome?	When will you make the judgement?
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
<i>The induction and training of mentors and mentees</i>				
demo	demo	no data entered	no data entered	no data entered
demo	no data entered	demo	no data entered	no data entered
demo	no data entered	no data entered	demo	no data entered
demo	no data entered	no data entered	no data entered	demo
<i>Target-setting and agreements between the mentee and the mentor</i>				
demo	demo	no data entered	no data entered	no data entered
demo	no data entered	demo	no data entered	no data entered
demo	no data entered	no data entered	demo	no data entered
demo	no data entered	no data entered	no data entered	demo
<i>Monitoring and evaluation</i>				
demo	demo	no data entered	no data entered	no data entered
demo	no data entered	demo	no data entered	no data entered
demo	no data entered	no data entered	demo	no data entered
demo	no data entered	no data entered	no data entered	demo
<i>The validation of learning outcomes</i>				
demo	demo	no data entered	no data entered	no data entered
demo	no data entered	demo	no data entered	no data entered
demo	no data entered	no data entered	demo	no data entered
demo	no data entered	no data entered	no data entered	demo

Area identified for action	What action will you take?	What are you seeking to achieve?	How will you judge the outcome?	When will you make the judgement?
----------------------------	----------------------------	----------------------------------	---------------------------------	-----------------------------------

Areas for special monitoring in case problems arise				
<i>Recruitment</i>				
demo	demo	no data entered	no data entered	no data entered
demo	no data entered	demo	no data entered	no data entered
demo	no data entered	no data entered	demo	no data entered
demo	no data entered	no data entered	no data entered	demo
<i>Managing risks and challenges</i>				
demo	demo	no data entered	no data entered	no data entered
demo	no data entered	demo	demo	no data entered
demo	no data entered	no data entered	no data entered	demo
demo	no data entered	no data entered	no data entered	demo
<i>Matching mentees and mentors</i>				
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
<i>The induction and training of mentors and mentees</i>				
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
<i>Target-setting and agreements between the mentee and the mentor</i>				
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered

Area identified for action	What action will you take?	What are you seeking to achieve?	How will you judge the outcome?	When will you make the judgement?
----------------------------	----------------------------	----------------------------------	---------------------------------	-----------------------------------

demo	no data entered	no data entered	no data entered	no data entered
<i>Monitoring and evaluation</i>				
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
<i>The validation of learning outcomes</i>				
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered

Cases where action is planned to build on success or to make the programme more robust				
<i>Recruitment</i>				
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
<i>Managing risks and challenges</i>				
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered

PART 4.

A toolkit for external verification

Area identified for action	What action will you take?	What are you seeking to achieve?	How will you judge the outcome?	When will you make the judgement?
<i>Matching mentees and mentors</i>				
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
<i>The induction and training of mentors and mentees</i>				
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
<i>Target-setting and agreements between the mentee and the mentor</i>				
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
<i>Monitoring and evaluation</i>				
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
<i>The validation of learning outcomes</i>				
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered
demo	no data entered	no data entered	no data entered	no data entered

1. Good self-assessment should provide a deep and thorough scrutiny of all aspects of your work. But it can be strengthened by contributions from outside your own organisation. Some reasons for this are:
 - An outsider may help you spot issues that you would otherwise take for granted (and this can include positive as well as negative points).
 - It can be easier to persuade external organisations of the validity of your conclusions if outsiders have been involved.
 - Outside participation will help verify your conclusions because it adds an element of independence – this can be very important in gaining recognition, and even formal accreditation, for your work.
2. But it is important to pick the right people
 - Be sure to provide them with adequate induction (remember that mentoring is new to many people – it is important that they don't mistake it for conventional teaching of training).
 - And make sure that they have information that will help them understand the particular characteristics of your mentoring programme.
 - It may be particularly helpful if you can recruit people who themselves have some experience of mentoring.
 - Make sure that they understand their role: they are contributing to help your process: they should not seek to change it to fit their agenda. So they must understand that their role is to support your self-assessment – not to conduct an individual (probably less informed and smaller scale) external assessment of their own.

3. Some roles for outsiders

- External opinions can be very useful in evaluating the way in which you carry out self-assessment.
 - Explaining how you do things to an outsider can help you to recognise things that otherwise you might not see as important.
 - They can pose useful questions – for example about whether you have included all stakeholders in your self-assessment or about the resources you have committed to the exercise.
 - They can help you to get the best benefits from your self-assessment, for example by putting you in touch with potential external stakeholders.
- They can act as an external member of the group (or groups) that conduct(s) your self-assessment. In this role they can be very useful in:
 - Helping ensure ‘fair-play’.
 - Helping to maintain standards in your self-assessment that parallel those elsewhere (surprisingly often self-assessment leads to harsher judgements than would be made by outsiders).

4. The toolkit provides a number of checklists, which we have called ‘Tools’ that are designed to help you to make the right choices in introducing external verification to your self-assessment process.

TOOL 1 Your purpose	Explain what you are seeking to achieve through external verification
Questions	Your answers
Are you hoping that this will help obtain external certification?	
Are you hoping to improve informal external recognition?	
Are you aiming to benchmark your programme against others in the field?	
Are you looking for experience in QA that is not available among your team?	
Are you simply looking for an independent, outside voice in your process?	

TOOL 2 Recruitment and selection of external participants	Remember: the decision about whether a person is appropriate is yours alone
Questions	Your answers
How have you decided where to look for external participants?	
Are you looking for someone who represents a particular institution?	
Or for her/his individual qualities? (If so, what?)	
Are you looking for someone to give you external credibility?	

TOOL 3 Organisations from which you might recruit external input	
Questions	Your answers
Does the organisation have particular expertise in: <ul style="list-style-type: none"> Your client group? Mentoring and/or non-formal learning? 	
Is the organisation sufficiently authoritative to provide external credibility to your procedures?	
Does the organisation share your approach to self-assessment?	
Have you had previous (positive) experience of working with the organisation?	

TOOL 4 Induction and training	
Questions	Your answers
How have you evaluated the relevant knowledge of the external person? Of, for example: <ul style="list-style-type: none"> Non-formal learning? Mentoring? Relevant Quality assurance systems? 	
What have you provided as information material about your programme?	
Have you encouraged the person to ask questions if s/he needs more information?	

TOOL 5 The methodology of external verification - how will the person participate?	
Questions	Your answers
Online or by scrutiny of documents?	
Participation as a 'peer' member of the team?	
As chair of assessment panels?	
As an independent external evaluator, attending meetings and reporting, but not actively participating?	
As an external evaluator, but with a formative input?	
At what time will external verification take place – alongside your self-assessment or afterwards?	

TOOL 6 Reporting and feedback	
Questions	Your answers
A written report?	
Oral feedback?	
Answers to a check-list you have prepared?	
When will you receive feedback? <ul style="list-style-type: none"> During the process? After completion of the process? 	
Will you make the report public?	

ANNEXES

ANNEX 1

Glossary of acronyms used in this document

APEL	Accreditation of Prior Experience and Learning
CoP	Code of Practice
CQAF	Common European Quality Assurance Framework
EEIG	European Economic Interest Group
EQF	The European Qualifications Framework
EQMM	European Quality Mark in Mentoring
QA	Quality Assurance
SSA	Statement of Self-Assessment
TWG	Technical Working Group
VET	Vocational Education and Training

ANNEX 2

Some main relevant areas of European policy

Note to readers

European policy in VET is continually evolving, so you to keep up to date, you are advised to consult the Europa database (www.europa.eu) and to check the CEDEFOP Virtual Communities on Quality (<http://communities.trainingvillage.gr/quality>) and on non-formal and informal learning (<http://communities.trainingvillage.gr/nfl>).

Policy area 1

The Common European Principles for the Validation of Non-Formal and Informal Learning

The Common European Principles express the commitment of the European Union to promoting the importance of recognising learning outside formal institutions – in other words learning of the type that is achieved through mentoring. They also provide guidance in some key aspects of the process – guidance that informs this Code of Practice.

The Principles aim to allow ‘comparability between approaches in different countries and at different levels’ and the identification and validation of non-formal and informal learning is seen as, in particular, supporting the needs of individuals disadvantaged in the job-market. The Principles clearly acknowledge the need to allow for national variations – and that in some countries validation can only be done by legally authorised organisations – but achieving comparability between these different approaches is seen as an important goal of European policy in this field.

They explain the framework within which any procedure to recognise the outcomes of mentoring should be based and the Code of Practice has been developed within this framework. The following summary draws together elements from various publications of the Technical Working Group (TWG). Comprehensive accounts are readily available on the Europa website.

1. Definitions:
 - **“Identification**’ is one ‘key instrument in enabling the transfer and acceptance of all learning outcomes across different settings’. It **‘records and makes visible the individual’s learning outcomes’**.
 - **‘Validation**’ is described as the other ‘key instrument’. It **‘is based on the assessment of the individual’s learning outcomes and may result in a certificate or diploma’**. *The issue here is the meaning of ‘assessment’. The proposals in the Code of Practice are based on the need to provide the fullest possible representation of the individual’s achievements within a realistic awareness of the limitations of conventional assessment procedures within the context of informal or non-formal learning.*
2. The aim of the ‘Common Principles’ is to allow ‘comparability between approaches in different countries and at different levels’.
3. The identification and validation of non-formal and informal learning is seen as, in particular, supporting the needs of individuals disadvantaged in the job-market.
4. The Principles clearly acknowledge the need to allow for national variations – and that in some countries validation can only be done by legally authorised organisations – but comparability between these different approaches should be possible.

5. The Principles are summarised as follows:
 - **‘Individual entitlements**
 - Identification and validation are matters of individual choice – people should not be forced to participate
 - Equal access and the protection of privacy are essential features
 - **‘Obligations of stakeholders**
 - We must establish proper and robust systems, including guidance and counselling for participants
 - Good quality assurance systems are crucial
 - **‘Confidence and trust**
 - Fairness and transparency of systems is essential and QA is stressed again
 - **‘Credibility and legitimacy**
 - The ‘balanced participation of stakeholders’ is essential – for example through a representative steering group
 - Assessment processes must be impartial and avoid conflicts of interest
 - The professional competence of those carrying out assessment must be assured.

Policy area 2

The European Qualifications Framework

The formal document establishing the EQF is at: COM (2006) 479 Final 5.9.2006

Proposal for a recommendation of the European Parliament and of the Council on the establishment of the European Qualifications Framework for Lifelong Learning (SEC2006 1093) (SEC 2006 1094)

The EQF presents a table (see below) showing learning outcomes associated with a series of levels of achievement from Level 1,

which is very basic, through to Level 8, which is equivalent to the highest stratum of postgraduate study (see Annex 3). The outcomes associated with each level are then divided into three categories: Knowledge; Skills; Autonomy and responsibility (alternatively expressed as ‘personal, social and organisational competencies’).

Mentoring is not inherently specific to any given level. However, the requirement to be able to reflect and review one’s own performance and to plan basic objectives may make it unlikely to be appropriate at the most basic levels (perhaps Levels 1 and 2) and it is not commonly used (although not unknown) at the highest levels. But it is widely applicable between these extremes. Although not essential, it may be useful to the promoters of mentoring schemes to consider the level (or levels) of their programme.

On the other hand, the EQF offers very useful guidance concerning the type of learning outcomes that can be achieved through mentoring. Of the three categories of learning outcome listed above, mentoring deals only in exceptional circumstances with the direct acquisition of knowledge and it is fairly rare for it to be primarily concerned with the development of skills. (Where knowledge or skills are addressed in mentoring it is far more likely to be a matter of how to make best use of the knowledge or skills of the mentee, rather than directly providing training in them.) The overwhelming emphasis of mentoring is on the third category, ‘autonomy and responsibility’ and ‘personal, social and organisational competencies’. Promoters will benefit considerably by examining this category of learning outcome if they wish to define the levels at which their programmes deliver.

Table 1: Descriptors defining levels in the European Qualifications Framework Table 1: Descriptors defining levels in the European Qualifications Framework

Each of the 8 levels is defined by a set of descriptors indicating the learning outcomes relevant to qualifications at that level in any system of qualifications.			
	Knowledge	Skills	Competence
	In the EQF, knowledge is described as theoretical and/or factual.	In the EQF, skills are described as cognitive (use of logical, intuitive and creative thinking) and practical (involving manual dexterity and the use of methods, materials, tools and instruments).	In the EQF, competence is described in terms of responsibility and autonomy.
Level 1 The learning outcomes relevant to Level 1 are	basic general knowledge	basic skills required to carry out simple tasks	work or study under direct supervision in a structured context

Level 2 The learning outcomes relevant to Level 2 are	basic factual knowledge of a field of work or study	basic cognitive and practical skills required to use relevant information in order to carry out tasks and to solve routine problems using simple rules and tools	work or study under supervision with some autonomy
Level 3 The learning outcomes relevant to Level 3 are	knowledge of facts, principles, processes and general concepts, in a field of work or study.	a range of cognitive and practical skills required to accomplish tasks and solve problems by selecting and applying basic methods, tools, materials and information	take responsibility for completion of tasks in work or study adapt own behaviour to circumstances in solving problems
Level 4 The learning outcomes relevant to Level 4 are	factual and theoretical knowledge in broad contexts within a field of work or study	a range of cognitive and practical skills required to generate solutions to specific problems in a field of work or study	exercise self-management within the guidelines of work or study contexts that are usually predictable, but are subject to change supervise the routine work of others, taking some responsibility for the evaluation and improvement of work or study activities
Level 5* The learning outcomes relevant to Level 5 are	comprehensive, specialised, factual and theoretical knowledge within a field of work or study and an awareness of the boundaries of that knowledge	a comprehensive range of cognitive and practical skills required to abstract and develop creative solutions to abstract problems	exercise management and supervision in contexts of work or study activities where there is unpredictable change review and develop performance of self and others

Level 6** The learning outcomes relevant to Level 6 are	advanced knowledge of a field of work or study, involving a critical understanding of theories and principles	advanced skills, demonstrating mastery and innovation, required to solve complex and unpredictable problems in a specialised field of work or study	manage complex technical or professional activities or projects, taking responsibility for decision-making in unpredictable work or study contexts take responsibility for managing professional development of individuals and groups
Level 7*** The learning outcomes relevant to Level 7 are	highly specialised knowledge, some of which is at the forefront of knowledge in a field of work or study, as the basis for original thinking critical awareness of knowledge issues in a field and at the interface between different fields	specialised problem-solving skills required in research and/or innovation in order to develop new knowledge and procedures and to integrate knowledge from different fields	manage and transform work or study contexts that are complex, unpredictable and require new strategic approaches take responsibility for contributing to professional knowledge and practice and/or for reviewing the strategic performance of teams
Level 8**** The learning outcomes relevant to Level 8 are	knowledge at the most advanced frontier of a field of work or study and at the interface between fields	the most advanced and specialised skills and techniques, including synthesis and evaluation, required to solve critical problems in research and/or innovation and to extend and redefine existing knowledge or professional practice	demonstrate substantial authority, innovation, autonomy, scholarly and professional integrity and sustained commitment to the development of new ideas or processes at the forefront of work or study contexts including research.

Policy area 3

Self-assessment and the CQAF

This are edited extracts from the original Commission document



EUROPEAN COMMISSION
Education and Culture

Lifelong Learning:
Education and Training policies
Vocational training and adult education

Fundamentals of A 'Common Quality Assurance Framework' (CQAF) for vet in europe

Self-assessment

Self-Assessment is a relevant method/tool to assess and evaluate quality, to ensure and develop quality at system and provider levels. It may cover one, several or all of the factors that have an impact on the quality of the VET provision, including the organisation of the VET system/institution, mechanisms and resources, pedagogical expertise, as well as relations to with external environments. The TWG has devised sample self-assessment guidelines for both levels².

VET systems and providers face an increasing need to improve their effectiveness in reacting to rapid changes in economic and social environments, giving adequate responses to stakeholders'/users' needs and using new technologies.

² See 'An European Guide to Self-assessment': <http://communities.trainingvillage.gr/quality>

Self-assessment helps VET providers to analyse their responses to these challenges, and to provide adequate feedback on areas needing change. At system level, self-assessment helps to improve good governance which is necessary to provide adequate statutory provisions, to allocate the necessary resources, to check results and provide feedback in due time, enabling VET-providers to respond and carry out the necessary changes.

In self-assessment one can distinguish two main approaches. It can be used by national bodies to pilot and support quality in VET provision: in this case self-assessment refers primarily to national VET goals and is implemented accordingly to country specific regulatory frameworks. In the second case the use of self-assessment is made voluntarily by VET providers at institution level, as a means to rationalise the training offer and improve its legibility, as a means to cope with the challenges of recognition, image and confidence building in a demanding and competitive market.

The European guide for self-assessment is primarily addressed to VET providers and gives guidance on ways of performing self-assessment, with concrete quality criteria and explanatory statements illustrated by examples from different VET systems. It contains also a guide for performing self-assessment at system level and gives an overview of different existing frameworks for self-assessment.

Monitoring system

Self-assessment is an important method in quality assurance, which builds on 'innate' knowledge. But it is an 'introspective' procedure and thus biased. It needs therefore to be combined with periodic external monitoring by an independent and appropriate third party body at national, regional or sectoral levels. This combination is a pre-condition to ensure the credibility, legitimacy and recognition of the evaluation of VET results and to support review. External monitoring can range from strict control and accounting measures

to more open systems where control is also committed to developmental purposes, possibly combined with voluntary peer review.

Monitoring systems, mechanisms and procedures are part of the regulation function in governance and they can be as diverse as the national systems, sub-systems and institutions are. The trend towards decentralised governance, supporting and relying on local know-how and creativity, goes together with an increasing strategic complementarity between internal and external procedures.

In many countries, inspection is a common external monitoring measure in publicly supported VET systems to complement self-assessment. It helps to ensure that internal assessments are challenged regularly and provide a clear and comparable analysis of the quality of VET through a grading system and published reports. Together with the controlling function, support and counselling of VET providers is being developed in most countries as a part of the work of inspection bodies, with a view to improving the quality of VET.

A specific monitoring measure, which is close to control, is the accreditation of VET providers, used in many Member States to harmonise and legitimate a wide variety of VET providers. This means compelling VET providers to meet a set of fixed minimum standards in order to be incorporated – at least for some time – in a VET system. This is particularly important for continuing vocational education and training (CVET) in which there was often little regulation and review of quality. Such initiatives have been taken both by public authorities, increasingly linked to financial incentives, and by the CVET market itself, as a self-regulation mechanism. Third party verifications of quality systems like ISO 9000 certifications and the EFQM are also being used and are fairly widespread in several countries, even though they are often considered to be too 'process oriented'.

Peer review can be a relevant tool as part of a monitoring system,

within and across countries. The reviewing process helps to identify and to assess good practices, to assess how good practices can be effectively transferred, and facilitates mutual learning at systems and institutional levels. A peer review plan across countries has been drawn up within the Work Programme of the TWG for 2004.

Measurement tool

Measuring quality and its components on all levels is a major challenge in quality management. The references made to indicators in each one of the elements of the model (see 3.1. above) show their importance throughout the quality cycle. The CQAF proposes a first common set of indicators to measure and assess the quality of VET (see annex 1).

The aim is to help Member States to ensure adequate and consistent follow-up and evaluation of quality development of their own systems, based on common qualitative and quantitative references. The set of indicators devised by the Technical Working Group can also be used as 'spot lights' to draw attention to the VET process at national level, and as a basis for exchanges of experiences and good practices

Two rationales have guided the selection of adequate reference indicators: the first one was to support the application of quality management systems at both VET provider and systems levels. The second rationale was to link quality management activities to policy objectives agreed at European level for the VET systems. These are to increase the employability of the workforce, to improve access to VET, especially for the vulnerable groups on the labour market, and to improve the match between VET supply and demand.

The selected indicators, which will be consolidated by the work programme for 2004, include contextual information as well as data relating to input, process, output and outcome. A certain focus has been given to indicators that are oriented towards the

measurement of outputs and outcomes of VET.

For three of the chosen indicators, existing data sources at European level can be exploited; for two of the indicators existing surveys could be extended. Additional data collection will be necessary for three indicators: share of VET providers using QM systems; investment in training of trainers; and utilisation of acquired skills at the workplace.

Practical initiatives

The use of the CQAF is voluntary. Its added value relies on bringing together means and tools to support Member States to progressively develop their own policies and practices, to promote sharing of experiences and mutual learning. Thereby it aims to contribute to improving quality in VET within and across European countries and to achieve greater convergence towards European objectives.

The application of the CQAF and its legitimacy depends strongly on the recognition of this added value and on political commitment in fostering ownership among all stakeholders concerned.

The CQAF needs to be consolidated following the assessment of practical initiatives and to be reviewed consequently while maintaining its main feature of independence against specific contexts. These initiatives can only take place, be monitored and reviewed in/by Member States and other participating countries with the involvement of the relevant stakeholders, and ensuring the best use of existing and future national and Community policy instruments.

At this stage, several Member States are promoting the creation of cooperative and voluntary networks and peer review arrangements in order to translate the CQAF into specific objectives and practical actions. In some countries, the CQAF is part of the debate on

the reform of the VET systems. The LdV programme is funding an increasing number of pilot projects on quality assurance, and will be used, along with the next generation of programmes, to promote institutional cooperation at European level in the field of quality assurance.

The Council Conclusions of 28 May 2004 on quality assurance in VET in Europe give a major impulse to co-operation in this field. The main challenges ahead are to translate these Conclusions into concrete actions and to ensure the sustainability and coherence of co-operation in this field.

For further information on the overall activities and outputs which stem from European cooperation in the field of quality assurance in VET since 2002 to now, you may visit the Virtual Community on quality assurance in VET (<http://communities.trainingvillage.gr/quality>).

ANNEX 3

Case Studies of mentoring partnerships

UNITED KINGDOM:

CASE STUDY: Kate and Becky

Kate is 38 and volunteered to be a mentor after attending a presentation by team project members at a local Chamber of Commerce Breakfast meeting. Prior to setting up her own training consultancy with a partner in 2007, Kate worked as a manager of staff training and development for a well-known national building society at their Head Office.

Having left school at 18 with good academic qualifications, Kate moved directly into the world of financial services, gained promotion with different companies and enjoyed the challenges and opportunities presented with this sector.

During her early childhood, Kate spent some years with her family in Australia before returning to England to complete her education.

Kate has extensive experience and expertise in the field of coaching and mentoring both as a practitioner and participant in various schemes. She reflects on her good fortune to have worked with managers and other colleagues who encouraged her to develop and 'take the next step'. She has always been well-motivated and keen to extend her professional business qualifications and career opportunities.

With the flexibility of owning her own company, Kate has the flexibility to balance her professional work commitments with responding to the needs of her mentee, Becky.

Becky is 22 and contracted meningitis when she was five days old. She reports that her eating, speech were impaired by the disease. Becky spent her school career from 5 to 18 years old in a state

special school - her school and post-18 college experience was one of recurrent academic and social challenges. Becky describes herself as 'being slow' and having learning difficulties that predominantly centre upon her literacy and numeracy skills.

During her time at a local college of further education, she had a 6-week period of work experience in a children's nursery and felt that this was the area of work to which she was best suited. Unfortunately, after leaving college Becky reports that the lack of individual support led to a rapid demise in her self-confidence.

Becky had never secured paid employment since she left college of further education in 2007 although she was engaged in short-term voluntary work within her local community. Becky reports that she has always felt ill-equipped to make decisions relating to employment since leaving school in 2004. In general, she has felt unsure as to how to find out about the world of work.

Over the past eighteen months, Becky has found it increasingly difficult to cope with the repetitive nature of long hours spent at home, isolation from other people and income restricted to state benefits. She contacted her local Remploy Branch during the autumn of 2008 on the suggestion of her local Job Centre Plus office and through the project's link with Remploy, Becky was taken onto the VM2 programme and matched with Kate. Becky had specified her preference for a female mentor.

Remploy is the UK's leading provider of employment services to people experiencing complex barriers to work.

Initially, Kate and Becky were briefed separately by the Project Officer as to the nature and scope of the project – what it could and could not offer and what both parties might reasonably expect from a mentoring partnership. There followed the matching of Becky with Kate based on the individual information they had provided following their original expression of interest in project participation.

Remploy allocated Becky a Recruitment Adviser (RA) whose responsibility it was to seek out possible employment

opportunities. The terms of Kate's partnership with Becky was to focus particularly on Becky's personal and social development, for example, the development of her self-esteem and job-readiness. It was important before the mentoring partnership was established to ensure that the relationship with the RA was unambiguous in terms of the respective responsibilities of each of the three parties.

Becky continued to meet with her RA from time-to-time though on an infrequent basis while Kate and Becky met regularly on a weekly or fortnightly basis. The duration of a mentoring session varied from 1-2 hours.

As part of UK legal requirements, Kate had to gain clearance from the Criminal Records Bureau to ensure that she was a suitable person to engage with Kate (deemed to be a potentially vulnerable person given her learning difficulties/disabilities). Until this clearance was secured, Kate and Becky were required to hold their mentoring session in the local Remploy offices. Subsequently, they met at other venues, including the local library where Becky enrolled for the first time as a member.

Kate and Becky were given a copy of the respective VM2 Guide for Mentors or Guide for Mentees. The guides were developed in the University of Worcester by the VM2 Project Team to accommodate and recognise the particular needs and interests of each party in the UK context and set out the terms of reference whilst at the same time, retaining the integrity of the Guides designed by the Lead Partner, Marie-Curie Association (based in Plovdiv, Bulgaria) to address the issues of a transnational project.

From the outset, Kate and Becky worked well together and built sound foundations for a partnership that they have recently agreed would extend beyond the six-month period originally planned. They signed a joint agreement as to the terms of reference and conditions of engagement required by the project. The nature and scope of confidentiality were also set out - the boundaries of the partnership were clearly stated.

Kate suggests that her style of mentoring had been more directive in the early stages than she had envisaged – this was attributable to

Becky's perceived lack of confidence to play a more proactive role within the partnership.

With Becky's growing respect for and trust in Kate, she felt comfortable in sharing her concerns and fears about a wide range of personal and social issues. They spent considerable time on exploring and reflecting on Becky's employment aspirations. Kate referred to engaging with Becky in a 'reality check' where she was invited to reflect on the attainability of her aspirations.

Kate was keen to encourage Becky to take 'some fresh steps' in order to build her self-confidence. For example, to travel unaccompanied on a public bus service from her home to their meeting place and to attend a lunch with other mentees in the student dining room of the University represented considerable achievements. Becky's willingness to participate in new ventures and to enjoy the associated feelings of success boosted her morale and enhanced her sense of greater personal freedom and independence.

Becky has reported that the rigour of viewing her needs in a systematic way through formulating and frequently reviewing a written action plan provided her with a clear focus. She referred to becoming aware that she should take greater personal responsibility for what she wishes to achieve.

Whilst still wishing to pursue her interest in child care, Becky has come to recognise that she may have to consider a broader range of possible job opportunities – this realisation has developed during her work with Kate. Although the current downturn in the national and international economic situation continues to a negative impact on employment opportunities, Becky's enthusiasm to secure a job has interestingly grown during her mentoring partnership.

Becky reports with pride of her growing self-confidence and this is reflected in the outcome of formal and informal assessments made at the start of and six months into her mentoring partnership with Kate. In summary, Becky feels more relaxed in herself and more confident when meeting with new people.

After six months in this partnership, Becky reported on her

satisfaction with the frequency and duration of sessions and that Kate had made her feel at ease, had responded to her needs and had encountered no difficulties with the mentoring process. Becky rated the mentoring process as 'good' and thought a similar process would be helpful to other people like her.

The triadic relationship between Becky, her RA and Kate worked well throughout the duration of their project involvement. This may be attributable to the early clarification of each person's respective roles when liaising with the other.

Becky is to start shortly at a local supermarket in her home town as a sales assistant as a part of a work experience arrangement made by the RA. Becky shops in the store and feels nervous about working with a large number of people but has expressed her determination to 'have a go'. Recently, Kate and Becky visited the store together, had coffee in the store and walked around discussing Becky's feelings about the new challenge. Becky valued this extension of her mentoring context.

There are pleasing signs that Becky is better placed to make personal choices and decisions about her lifestyle as well as about vocational matters. To some observers, Becky's progress to greater self-determination may represent small steps but to her, she has feelings of greater self-worth and improved drive to succeed. For example, Becky spends less time alone at home, stays overnight with friends and travels unaccompanied on public transport.

Throughout the project, Kate took advantage of the support of the Project Officer and other VM2 mentors through one-to-one communications and attendance at regular meetings for mentors. These meetings provided an opportunity to share issues of mutual concern and interest with colleagues whilst retaining the confidential nature of specific exchanges within each mentoring partnership.

Becky and Kate were one of seven successful voluntary partnerships in Worcestershire, England where mentees were identified through Remploy and mentors from the local business community volunteered to act as mentors. The matching process was

undertaken by the University of Worcester's VM2 project team.

Case Study: Lorna and Brian

Brian is 44 and volunteered to be a mentor as part of a group of people within the local municipality through a programme operated by LinkNet Mentoring.

Brian is an economic development officer and has spent most of his working life in the council. He is married with children and has no experience of mentoring prior to getting involved in this programme. When offered this opportunity to be a mentor, and with the support of his workplace, he was genuinely excited at the chance to share his life skills with others and saw this as a good thing for his own development too.

Lorna is 57 and had been unemployed prior to being offered a temporary placement with the local health authority. With grown up children and no partner, Lorna has been in and out of various jobs throughout her working life prior to the 6 years of unemployment she faced recently. Lorna saw the VM2 project as a chance to have someone who could act as a life coach, outside her personal social networks, to support her to develop and gain and subsequently remain in employment.

Preparation for the start of the mentoring process

Edinburgh Chamber of Commerce worked with LinkNet Mentoring and together both organisations spoke with Lorna and Brian about the nature and scope of the project – What they might expect, what they might have to put in and what the programme could and could not offer. This was done across the whole programme and was followed by the matching of Lorna with Brian based on the individual information they had provided following their original expression of interest in project participation.

Through Edinburgh's Joined Up for Jobs network we were able to place Lorna in a temporary job with NHS Lothian which had the chance of becoming permanent. It was explored and agreed

that Brian's mentoring partnership with Lorna was to focus particularly on Lorna's personal and social development, such as the development of her confidence and self-esteem and to support her to remain in employment and further develop.

In the first 2 months of the mentoring relationship Lorna and Brian met every 2 weeks, which then reverted to a monthly meeting. The duration of a mentoring session lasted between 1 & 2 hours. Some meetings were held at Lorna's workplace and some at other venues, such as coffee shops.

Lorna and Brian were given a copy of the respective VM2 Guide for Mentors or Guide for Mentees as well as the standard LinkNet Mentoring paperwork.

First meetings and the mentoring process

Lorna and Brian had never been involved in mentoring prior to this partnership and had nothing to base things on but worked well together and built some solid foundations for a partnership. Using standard paperwork they signed a joint agreement as to the terms of reference and conditions of engagement required by the project. The mentoring relationship has reached the end of the 6 months and the partnership has been dissolved but both parties have agreed to, and want to, keep in touch.

Brian felt he applied a number of the skills he had gained as a manager of people and used them as part of his mentoring role. Lorna felt that she needed to respect and trust Brian before she felt comfortable in sharing her concerns and fears about a wide range of personal and social issues. Once this happened (fairly early in the relationship), things flowed well and the partnership grew and blossomed.

Having got Lorna into her work placement as part of the programme, a good deal of time was spent exploring the job and how Lorna could turn a temporary position into a permanent one. Brian was able to use many of his employability skills to great benefit. Throughout the partnership, Lorna's confidence and self-

esteem grew, and this impacted on the manner in which she carried out her job. This has manifested itself in the informal and formal assessments carried out as part of the programme and within the workplace.

Throughout the project, Lorna and Brian met with the project team and other VM2 mentors and there was a series of one-to-one communications and a number of regular meetings for mentors and mentees. These meetings provided an opportunity to share issues of mutual concern and interest with colleagues whilst retaining the confidential nature of specific exchanges within each mentoring partnership.

Lorna and Brian were one of eight successful voluntary partnerships in Edinburgh where the mentees were all people at risk of exclusion from the workplace and either in young (18/19) or "seniors" (50+). Working with LinkNet Mentoring we were able to find mentors from the private and public sectors to provide mentoring on a voluntary basis.

BULGARIA:

Case study - Stanislav and Marinela

My name is Stanislav and I am 21 years old. I was born in the town of Sliven. I completed my primary and middle school education in VII "Panaiot Hitov" School. Afterwards I graduated from vocational high school in hotels and tourism. I had a lot of difficulties when I was a student but when I enrolled a course in Computer Studies everything became better. I know a lot about computers but so far no company has given me the chance to show it. I registered in the Bureau of Labour, but without any benefit.

My motivation for participation in the mentoring programme is associated with my hope to find a job. I considered that it would be very useful to meet new people and to learn more about the new documents that are necessary for the application and start work.

My name is Marinela Nikolova and I am 39 years old. I work as a professional in "Social Activities" in a sheltered house. My working experience is related to work as a doctor's assistant in medical health services, social worker and educator in specialized institutions. I became acquainted with the mentoring programmes as soon as I started working in the sheltered house. I was intrigued by their flexibility.

According to my motivation for participation in the mentoring programme I should note that I have been working with people with mental disabilities for a long time and my efforts are focused in this direction. The mentee, who I worked with, is a young man in social isolation. After I met him I decided to work together to overcome the isolation in which he was caught. I decided to help for improving his life by emotional support, basic social skills development and establishment of new contacts. That what bothered me was my busy schedule and the lack of enough free time. Ultimately I believed in myself that I can be useful for young people and my willingness to help prevailed.

Stanislav's preparation for the mentoring programme: My preparation was individual and consisted of briefing about the nature, advantages and benefits of the mentoring programme as well as for the opportunities it provides. Afterwards I participated in a group where we could learn more about the way we should act in applying for a job. I attended the computer course with pleasure and I learned very interesting things from the tutor. My first expectations from the programme were to be given guidelines for finding a job and the appropriate conduct of an employee. At the end of the programme, the most important thing I learned was how to communicate with new people, future colleagues, to take decisions in different situations and to be more responsible.

Marinela's preparation: My preparation for the mentoring programme started with my appointment as a professional in "Social Activities" in a sheltered house. In our country the opportunities for employment of people with different problems are very few. However, even more alarming is the fact that their access to social environment is also limited. Therefore, my

colleagues had identified the program as a way to "open" social environment for customers, to implement the necessary prevention of such relationships (through the mentoring programmes our clients attended different social environment and for a part of the day they were separated), and last but not least as a way of acquiring of personal and professional skills. Immediately before the start of the mentoring programme, where I myself was a mentor, I had multiple conversations with the coordinator in which we talked about the meaning, nature, philosophy and technology of the mentoring as well as for my position as a mentor. I understood that the most important thing in this process is the mentee to feel himself/herself as "important" and significant.

Due to the fact that I had some experience as an observer of a mentoring process my expectations from the very beginning were absolutely positive and there was no doubt for me about usefulness of the process. Everything what happened to our couple till the end of the process not only confirmed but also exceeded my expectations. The most precious for me was the opportunity personally to experience the programme in order to be helpful using its methods for other people.

Stanislav's opinion for the first mentoring meetings: The first meetings with my mentor were very exciting. We talked about different themes. I demonstrated my computer skills and we discussed our joint work. It was a long time ago when someone was interested so much in my opinion. After a few meetings I found out that my mentor is a good person, an excellent professional and a patient tutor.

Marinela's opinion for the first mentoring meetings: Our first meeting with the mentee was emotional to me. I was a mentor for the first time and I wanted to catch the fancy of the young man I would mentor. I wanted to give him ease and confidence. I wanted to get to know him and to find out what he expected from me. I noticed that my mentee was very anxious during our first meeting. At the very beginning he shared his desire to become a volunteer in the Bulgarian Youth Red Cross and I can tell that his desire is already reality. He told me that he would like to find a job working with a

computer or on a reception desk.

Stanislav's evaluation of the mentoring process: During the mentoring process I aimed at developing of my word processing skills, experiencing pleasant emotions and meeting new people. Prevailing in the mentoring were the practical activities and we had our meetings once a week for a few hours. I felt wonderful in my mentor's team. They welcomed me and were cooperative all the time.

The mentoring programme fulfilled my expectations. The most satisfactory thing for me was that I made new friends and useful contacts. Every time I was eager for the meeting to come because there I met new friends. My mentor is a social worker in the Sheltered House in the town of Sliven where six wonderful ladies live. They all became very close to me so I looked forward to the meetings. I was always excited. We talked about different things and watched TV with the girls in the Sheltered House. I also taught them to use my computer. When they had personal celebrations they always invited me and that made me really happy. I was pleased with everything what happened to me.

Marinela's evaluation of the mentoring process: During the mentoring process we aimed at developing of my mentee's communicative abilities, creation of pleasant emotions of his life and preparation for his participation in the voluntary organization Bulgarian Youth Red Cross. To achieve these aims of our joint work we used the means of theoretical and practical activities where the mentee participated actively with a great willingness. Through our meetings he became more communicative, confident, free, and open to new experiences. My colleagues supported our mentoring couple demonstrating respect to the mentee's efforts and they were sensitive when interfering in our business. I could not point out anything in the mentoring relationship that troubled me but it was a challenge to me to get to know the mentee and to be useful for him.

I would like to share my joy of participating in the mentoring programme and my satisfaction from the results which I believe

we achieved. I hope I was useful to my mentee not only with knowledge and skills but also with the new contacts and friends made. Personally, I was able to know in detail the mentoring programme and to use it in my work in the future. My participation as a mentor in the programme enriched me professionally but also reminded me that we can always give more than we expect from ourselves.

Case Study - Iordanka and Ruzha

My name is Iordanka Iankova. I am 43 years old. In 1985 I completed a course in a Vocational Technical School in Ovcha Mogila village. Since then I have worked only 2 years as a general worker in a tailoring enterprise. I do really want to study and to work but for 20 years I have not been employed. I am a person with disability. Now I am living in Sheltered House – Sliven with 5 more women. I dream of finding a work as some of the women in the Sheltered House did. I would like to work and to meet people who could be my colleagues and friends. Every summer I visit my relatives in Dolni Lukovit village in Pleven district. I decided that I could also try to find a job there. Last summer I tried but they answered me that I needed additional qualification and preparation because I had not been employed for a long time.

I want to be useful but it is difficult to find a job and I do not have the necessary education and qualification. Two girls from the Sheltered House participated in the mentoring programme and they started working. I believe that the mentoring programme will help me to gain the necessary preparation so I can find a job one day. One of my dreams is to work in order to have incomes, to be useful, to have colleagues, many new friends, and to be like the other people.

My name is Ruzha Stoyanova and I am 54 years old. The first year in my working experience was in a subsidiary school. I worked there as an educator with mentally retarded children aged 7-18 years. After that for about 20 years I have been dealing with Labour Rationing and Organization in an industrial plant. There I realized that "it is not easy to work with the so-called normal people". I have been

developing my own business since the years of democracy.

I am toys manufacturer and I continue to work with women at different age and with different intellectual capacity. Thus when I met lordanka with pleasure accepted the challenge to go back 35 years ago. My arguments so far and still are only "for". This is the reason why I decided to be helpful using my experience gained through the years and to support people with disabilities. The coordinator briefed me about the nature and the scope of the programme as well as about the benefits which the participation in the mentoring programme provides.

According to the preparation for participation in the programme lordanka says: To be included in the mentoring scheme I received individual preparation by being briefed for the nature of the programme and what my participation means, my commitments, the benefits and the opportunities provided by the training in working environment. Initially, I expected that I will be taught by my mentor to different useful things about sewing but soon I realized that I will recall what it means to go to work. I got out of the habit to wear a working suit, to be punctual for the meetings, not to smoke whenever I would like to. Of course, many times I have tried to take into consideration all these things but when you have a mentor you become more responsible. I have learned many things during my preparation. One of them is that I take a huge responsibility when I learn that work is a commitment.

Ruzha's reflection on the mentoring process: Initially I showed her what I produce and as you know the toys impress everyone from the youngest to the oldest. And lordanka is not an exception – toys gave her great joy. We started with an easy process namely with filling the toys. During the working process we always talked and I made her feel at ease and to share with me the things that impress her. The personal objectives we set were forming of working skills and acquiring or working experience. We met twice a week for 2 hours per meeting. I think that she was more active. Because of my engagements, sometimes it was necessary to call off our meetings and I immediately could see her great disappointment. Our main objective was acquiring or professional skills. This was the reason

why I chose the easiest process – filling the toys. I did not encounter any difficulties and working with lordanka was a pleasure for me.

lordanka's first impressions: My first impressions of Ruzha, my mentor, were that she was very careful and good. Afterwards I understood that she is strict and want me to learn to work well and to keep order and discipline. I think she respects me very much and that she is dedicated. One of the first things I learned from her is that I should make efforts in order to achieve my dreams.

First things we did when I met Ruzha were to show me around the warehouse, to show me the toys and the machines, and the process of sewing the toys. Everything was new and interesting for me. We started getting to know each other. Our mutual objectives in the mentoring programme were to teach me manually to sew, fill, and form the toys. We met each other twice a week. The duration of our meeting was two hours. I wanted to meet her more frequently but I complied with the obligations and potentialities of my mentor. During our work a part of my tasks was to form and fill the plus toys with wadding. Activities in which I participated were predominantly practical. I learned from Ruzha's experience. She showed me what to do and I did it. I was very well accepted by Ruzha's colleagues, who were attentive and responsive to me. Initially I worked slowly and not so well but after a few meetings I worked much better. It was difficult for me to be punctual in coming into the workshop and to keep the order there.

I am really satisfied from my participation in the mentoring programme. My initial expectations were fully justified. I learned to work, to get up early for work, to implement what I am told and to get along with everybody. I learned that I can work and to be useful. Personally I realized that I can be good with people who have opinions different from mine as well as to respect and help them as they help me.

Ruzha's opinion about the programme: The mentoring programme was not a surprise to me. I started answering the questionnaire that it is not new for me and I do not work with disadvantaged people for the first time. I do not know whether lordanka will use in the

future what she has learned but I am sure that I gave her a great pleasure and she understood that she can work and talk with other people. Nothing new happened to me. I am satisfied that I could be useful. I have no criticism, on the contrary, I think that the people I met are wonderful and I think they work with pleasure.

TURKEY:

Case Study 1 Turkey:

Mentor Yusuf SENUFUK, age 37, is a teacher with a Master's Degree and an administrator at a school. He has been matched with mentee Önder ERBİLEN, age 27, who has problems in communication and expressing himself due to mental disability. The mentee had no previous work experience.

Both the mentor and the mentee had training about the mentoring process. The mentee had mental disability so the coordinator and Yusuf met together with the mentee and walked him through the steps of the mentoring process before the program began. So the mentee knew what to expect and he trusted Yusuf and the coordinator since his uncle took him to the first few meetings.

Mentor and mentee met several times to decide on a work plan and they prepared a development plan together. During the first couple of meetings the mentor-mentee came together to select the meeting time, frequency and place in addition to the agenda they would follow in terms of improving the skills of the mentee. Mentor had information about the mentee beforehand from his uncle since the mentee could not express himself verbally very well so it was easy to prepare a mutually satisfying plan that would meet the needs of the mentee. The mentee had good dexterity in using his hands and body and he was very careful and particular about cleanliness, so it was decided that it would be best to support him in learning to do office cleaning as an employability option. After conferring with the Provincial Directorate of Youth and Sports, it was agreed that in addition to mentor-mentee meetings, Önder would go to the Directorate with Yusuf to have hands-on training in

office cleaning.

The mentoring sessions were balanced between theoretical and practical issues. Mentor Yusuf provided the mentee with support and guidance and focused on issues of self-esteem, self-determination and self-reliance. The mentor also focused on communication skills since the mentee had problems communicating. The theoretical meetings between the mentee and the mentor took place in the office of the coordinator for 2 hours a week and that helped the mentee to socialize with the office personnel at coffee breaks. The mentor and mentee expressed their belief that they improved themselves a lot during the mentoring process and both felt very good to have accomplished the tasks that were mentioned in the development plan. The uncle of the mentee said that with the office cleaning job, the mentee felt better about himself, felt he could have a job in the sector, and his morale increased a lot because he felt he was good at one thing he liked doing.

The mentor and mentee both said that they would like to continue the mentoring process if possible and they would recommend the program to everyone.

Case Study 2 Turkey

Mentor Bayram KAYRETLİ, age 26, is a high school graduate and owns a restaurant. Since he has been in this business for a while, he felt confident that he could teach service skills to a mentee who was interested in that kind of service sector. He has been matched with mentee Hakkı ERKAN, age 66 who had an interest in working in the food sector. The mentee was retired and felt himself to be of no use to society and wanted to take part in working life again to feel more social.

Both the mentor and the mentee had training about the mentoring process. Mentor and mentee met several times to decide on a work plan and they prepared a development plan together. During the first couple of meetings the mentor-mentee came together to select the meeting time, frequency and place in addition to the

agenda they would follow in terms of improving the skills of the mentee. The mentee expressed his feelings rather well and said that he started feeling lonely with the passing of each year and felt psychologically and physically tired since he had no particular aim all day. He wanted to learn new skills which he could use later and take part in a project to have the feeling of accomplishment and being with others for a specific reason. Since the mentee had good verbal skills, mentor and mentee had no trouble setting up a work plan. He wanted to learn service skills and the mentor's workplace offered great opportunities for the mentee to observe and apply the skills along with improving his chances of socializing since he would be in a crowded and positive environment for a specific time every week.

The mentoring sessions were balanced between theoretical and practical issues. The theoretical meetings between the mentee and the mentor took place in the workplace of the mentor for an hour per week and the mentee had a chance to apply his knowledge for several hours if he chose to do so. It was fun for the mentee since he learned and applied some skills he could use later in real life.

The mentor said that Mr. ERKAN learned some skills in serving food and setting up tables along with packaging for fast food and he is working in the restaurant regularly now. The mentee felt more peaceful and content after he started the weekly sessions with the mentor. He said that he felt better physically too and felt that he was still good for something in life.

The mentoring process in this case helped an elderly man to hold on to life tighter and happier and showed the mentor and the mentee that you can still do many things and learn from each other even if you get older and retire. The mentor told in the interview that he also learned many things about life and other things from the mentee during their talks and he felt very good sharing what he knew with someone in return.

The mentor and mentee both said that they were going to continue the mentoring process since they were working together now and they would recommend the program to everyone.