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Lesson: Methods and tools for mentoring

Module: Teaching Social Entrepreneurship & Mentoring
Student Projects

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Contents

1 The mentoring relationship	3
1.1 Introduction	3
1.2 The mentoring relationship standards.....	3
1.2.1 Recruitment	4
1.2.2 Screening – selection	5
1.2.3 Training of mentors.....	5
1.2.4 Matching and initiating the mentoring relationship.....	7
1.2.5 Monitoring and support.....	8
1.2.6 Closure.....	9
1.3 Key factors for a successful mentoring session	10
2 References.....	12
3 Annexes.....	14
3.1 .. Written agreement between mentor and mentee (Template).....	14
3.2 Mentoring Record Form.....	16

1 The mentoring relationship

1.1 Introduction

This lesson focuses on two main elements of mentoring: (1) building successful mentoring relationships; and (2) implementing the mentoring activity, here social entrepreneurship projects. Firstly, the standards for building a successful mentoring relationship will be introduced. Referring to the mentoring activity, the method of using the social business model canvas will be presented. Another important element related to the activity of mentoring and specific to social enterprises is measuring impact. A short introduction on how to do that will also be made.

1.2 The mentoring relationship standards

The success of the mentoring activity relies on several factors, from which the mentoring relationship is among the most prominent. According to leading US practices applied in several mentoring programmes, are six core standards for practice also recognized in Europe: 1) Recruitment, 2) Screening, 3) Training, 4) Matching and Initiation, 5) Monitoring and Support, and 6) Closure.¹ The six standards are evidence-based: only recommendations for practices that were demonstrably associated with positive effects in independent scientific studies were included.² The standards are understood as a kind of orientation framework. They show an approach, a basic direction, a framework that must be filled appropriately in each case. Nonetheless, each mentoring relationship is different. They are presented in this chapter and numbered according to the original reports.

* Benchmark (B) and Enhancement (E) practices that are marked with an asterisk represent those that are either new or were substantially changed from the previous edition of the report. For the present course, only the benchmarks and enhancements relevant to mentoring practices for social entrepreneurship are presented.

Despite the similarities between the mentoring programmes in the USA and Europe, there are also some differences. For example, a recent cross-cultural study found that in the USA, the focus is

¹ Garringer, Michael; Dr. Janis Kupersmidt et al. (2015): Elements of Effective Practice for Mentoring. 4th edition.

² Amoruso-Stenzel, Florian, Bernd Schüler (2021?): Qualität von Patenschafts- und Mentoringprogrammen einschätzen und entwickeln. Eine Einführung in die „Elements of Effective Practice for Mentoring™“ aus den USA – und die ersten Erfahrungen deutscher Programme damit.

mostly on the results of the mentees alone, while in Europe the learning experiences of the mentors are also focused more strongly.³

1.2.1 Recruitment

The coordinator finds suitable mentors and mentees, by realistically describing the objectives and content of the programme, the time commitment for mentors and mentees alike, and the expected results. When recruiting potential mentors, it is important for mentoring programs to set realistic expectations regarding what a mentoring relationship is and what it can achieve.

It is important to keep in mind that people need to see an ad for an organization or programme on a regular schedule and multiple times before they make the decision to volunteer for mentoring.

B.1.1 The programme uses recruitment strategies that realistically represent the benefits, practices used, support and potential challenges for mentors in the programme.

B.1.2* The programme uses recruitment strategies that promote positive attitudes and emotions towards the programme (such as direct questioning, social media, traditional mass media, presentations, recommendations).

The content of the messages incorporated in recruitment materials can have a direct effect on the success of the recruitment campaign. For example, recruitment messages that are inaccurate, misleading, or missing key information can result in short-term recruitment success, but long-term volunteer failure.

B.1.3* The programme recruits mentors whose skills, motivations and experience best match the objectives and structure of the programme.

B.1.4* The programme encourages mentors to support recruitment efforts by providing them with resources to ask suitable people they know to become mentors.

B.1.5* The programme trains mentees in this and encourages them to find and recruit suitable mentors for themselves if necessary.

B.1.6* The programme uses recruitment strategies that realistically represent the benefits, practices used, support and potential challenges for mentees in the programme.

³ Amoruso-Stenzel, Florian, Bernd Schüler (2021?): Qualität von Patenschafts- und Mentoringprogrammen.

B.1.7 The programme recruits mentees whose needs most closely match the services offered in the programme.

E.1.1* The programme communicates with mentors about the benefits that mentoring and volunteering can offer them.

1.2.2 Screening – selection

The coordinator of the mentoring programme selects potential mentors and mentees taking into account their availability, their willingness to commit and their personal qualities to offer safety and support for a young person. The coordinator selects mentees who have the necessary time, willingness and desire to participate in the programme.

B.2.1* Program has established criteria for accepting mentors into the programme as well as criteria for disqualifying mentor applicants.

The longer the mentoring relationship, the clearer the criteria for selecting applicants should be.

B.2.6* Prospective mentors agree in writing to a minimum time commitment for the mentoring relationship that is required by the mentoring programme.

A draft version of a written agreement between mentor and mentee is annexed to this lesson.

B.2.7* Prospective mentors agree in writing to participate in face-to-face or online meetings with their mentees during the mentoring relationship at a minimum frequency and amount of hours that are required by their mentoring programme.

B.2.8* The programme has established criteria for accepting mentees as well as criteria that would disqualify a potential participant.

B.2.12 Mentees agree in writing to participate in face-to-face or online meetings with their mentors at a minimum frequency and amount of hours that are required by the mentoring programme.

1.2.3 Training of mentors

The coordination prepares potential mentors, mentees and parents/guardians and provides the basic knowledge and skills needed to build an effective and safe mentoring relationship.

Mentor training is a vital component of any successful mentoring programme. It appears that most mentors involved in a mentoring programme have received some type of pre-match training or orientation. Volunteers who receive training tend to be more satisfied which, in turn, can promote

greater retention, a key component of effective mentoring relationships. Mentor training is particularly important because it has documented implications for match length, as well as both mentors' and mentees' perceptions about the quality of their mentor-mentee relationship including their feelings of closeness, support, satisfaction, and effectiveness as a mentor. Further, these perceptions of the mentor-mentee relationship are thought to influence the positive outcomes and continuation of the mentor-mentee relationship, suggesting the lasting importance of mentor training for youth outcomes.

B.3.1 The programme provides a minimum of pre-match mentor training in-person or online.

B.3.2 The programme provides pre-match training for mentors on the following topics:

- Program requirements (e.g. match frequency, duration of meetings, protocols for meetings and for missing, being late to meetings, and match termination);
- Mentors' goals and expectations for the mentee and the mentoring relationship;
- Mentors' obligations and appropriate roles
- Relationship development and maintenance
- Ethical and safety issues that may arise related to the mentoring relationship
- Effective closure of the mentoring relationship
- Sources of assistance available to support mentors
- Initiating the mentoring relationship

B.3.3* Program provides pre-match training for the mentor on the following risk management policies that are matched to the programme model, setting, and target groups served:

- Appropriate physical contact
- Contact with mentoring programme (e.g., who to contact, when to contact)
- Relationship monitoring requirements (e.g., response time, frequency, schedule)
- Approved activities
- Confidentiality and anonymity
- Digital and social media use
- Emergency and crisis situation procedures
- Discipline
- Inclusion of others in match meetings (e.g., siblings, mentee's friends)
- Photo and image use
- Evaluation and use of data
- Grievance procedures
- Other programme relevant topics
- * Conflict resolution is an additional relevant topic.

B.3.4 The programme uses training practices and materials that are informed by empirical research or are themselves empirically evaluated.

E.3.4* The programme provides training for the mentee on the following topics:

- Purpose of mentoring
- Program requirements (e.g., match frequency, duration of meetings online and in-person, protocols for missing or being late to meetings, match termination)
- Mentees' goals for mentoring
- Mentors' obligations and appropriate roles
- Mentees' obligations and appropriate roles
- Ethics and safety in mentoring relationships
- Initiating the mentoring relationship
- Effective closure of the mentoring relationship
- *Conflict resolution is an additional relevant topic

E.3.5* Program provides training for the mentee on the risk management policies that are matched to the programme model, setting, and target groups as presented under B.3.3*:

1.2.4 Matching and initiating the mentoring relationship

The programme coordination initiates a relationship between mentors and mentees. It uses strategies to increase the chances of this relationship being sustainable, long-lasting and effective.

B.4.1 The programme considers the characteristics of the mentor and mentee (e.g., interests; proximity; availability; age; gender; race; ethnicity; personality; expressed preferences of mentor, and mentee (if appropriate); goals; strengths; previous experiences) when making matches.

B.4.2 The programme arranges and documents an initial meeting between the mentor and mentee.

B.4.3 If necessary, the programme staff member should be on site and/or present during the initial match meeting of the mentor and mentee.

B.4.4* If relevant, mentor, mentee, and a programme staff member meet in person to sign a commitment agreement consenting to the programme's rules and requirements (e.g., frequency, intensity and duration of match meetings; roles of each person involved in the mentoring relationship; frequency of contact with programme), and risk management policies.

E.4.2* The programme sponsors a group matching event where prospective mentors and mentees can meet and interact with one another, and provide the programme with feedback on match preferences.

E.4.5* The programme staff member prepares mentor for the initial meeting after the match determination has been made (e.g., provide mentor with background information about prospective mentee; remind mentor of confidentiality; discuss potential opportunities and challenges associated with mentoring proposed mentee).

E.4.6* The programme staff member prepares mentee and his or her parents or guardians for the initial meeting after the match determination has been made (e.g., provides mentee with necessary background information about selected mentor).

1.2.5 Monitoring and support

The programme staff accompanies the mentoring relationship and its development. Each tandem is supported throughout the entire process with counselling, and problem-solving opportunities. Assessing the quality of each mentoring relationship from the perspective of both the mentor and mentee can yield valuable information for supporting individual matches.

B.5.1 The programme staff contacts mentors and mentees at the beginning and after the mentoring programme ended.

B.5.4 The programme follows evidence-based protocol to elicit more in-depth assessment from mentors and mentees about the quality of their mentoring relationships, and uses scientifically-tested relationship assessment tools.

B.5.7* The programme regularly assesses all matches to determine if they should be closed or encouraged to continue.

B.5.8 The programme documents information about each mentor-mentee meeting including, at a minimum, the date, length, and description of activity completed.

B.5.9 The programme provides mentors with access to relevant resources (e.g., expert advice from programme staff or others, publications, Web-based resources, experienced mentors) to help mentors address challenges in their mentoring relationships as they arise.

B.5.10* The programme provides mentees with access or referrals to relevant resources (e.g., expert advice from programme staff or others, publications, Web-based resources, available social service referrals) to help them address needs and challenges as they arise.

B.5.12* The programme provides mentors with feedback regarding their mentees' outcomes and the impact of mentoring on their mentees to continuously improve mentee outcomes and encourage mentor retention.

E.5.4 The programme thanks mentors and recognizes their contributions at some point during each year of the mentoring relationship, prior to match closure.

Volunteers report that informal, personal forms of recognition such as thank you notes are the most meaningful.

When setting mentoring goals, it is important that they are formulated positively, such as: In the mentoring session, we plan to define a social problem and find an appropriate solution to solve it. A negative formulation would be: In the mentoring session, we plan to avoid something happening.

1.2.6 Closure

The tandem is supported in ending the mentoring in a way that recognises the contributions of both the mentors and the mentee. Those involved are given the opportunity to respect and evaluate the experience.

Communication regarding closure policies and procedures should occur throughout the life cycle of the mentoring relationship with all members of the match.

B.6.1 The programme has a procedure to manage anticipated closures, when members of the match are willing and able to engage in the closure process.

B.6.2 The programme has a procedure to manage unanticipated closures, when members of the match are willing and able to engage in the closure process.

B.6.3* The programme has a procedure to manage closure when one member of the match is unable or unwilling to engage in the closure process.

B.6.4 The programme conducts exit interview with mentors and mentees.

B.6.5* The programme has a written policy and procedure, when relevant, for managing rematching.

B.6.6* The programme documents that closure procedures were followed.

B.6.7* Regardless of the reason for closure, the mentoring programme should have a discussion with mentors that includes the following topics of conversation:

- a. Discussion of mentors' feelings about closure
- b. Discussion of reasons for closure, if relevant
- c. Discussion of positive experiences in the mentoring relationship

- d. Procedure for mentor notifying the mentee far enough in advance of the anticipated closure meeting to provide sufficient time to adequately prepare the mentee for closure
- e. Review of programme rules for post-closure contact
- f. Creation of a plan for post-closure contact, if relevant
- g. Creation of a plan for the last match meeting, if possible
- h. Discussion of possible rematching, if relevant

B.6.8* Regardless of the reason for closure, the mentoring programme should have a discussion with mentees that includes the following topics of conversation:

- a. Discussion of mentees' feelings about closure
- b. Discussion of reasons for closure, if relevant
- c. Discussion of positive experiences in the mentoring relationship
- d. Procedure for notification of mentor, if relevant, about the timing of closure
- e. Review of programme rules for post-closure contact
- f. Creation of a plan for post-closure contact, if relevant
- g. Creation of a plan for the last match meeting, if possible
- h. Discussion of possible rematching, if relevant

B.6.9 The programme has a written public statement to parents or guardians, if relevant, as well as to mentors and mentees that outline the terms of match closure and the policies for mentor/mentee contact after a match ends (e.g., including contacts using digital or social media).

E.6.2 Program hosts a final celebration meeting or event for mentors and mentees, when relevant, to mark progress and transition or acknowledge change in the mentoring relationship.

E.6.3* The organizers collect good practice case studies for future recruitment campaigns for mentors and mentees.

1.3 Key factors for a successful mentoring session

In the mentoring sessions the advice, knowledge sharing and problem solving take place. A mentoring relationship is a two-way process. While it is expected that the mentee drives the session with questions, problems, and goal setting, it is important for both mentor and mentee to have a clear meeting structure. By having structured mentoring sessions, the participants can follow up actions and keep the conversation focused more easily.⁴

⁴ <https://guider-ai.com/blog/how-to-run-a-productive-mentoring-session/>.

An important aim of the mentoring session is that the discussions, challenges, and solutions raised are all contributing to the mentee's overall goals.

Several actions can assure a successful mentoring meeting:

- The day before the session, the mentee and mentor agree on the agenda. They set the desired discussion areas, expectations and goals to achieve during and after the session, outline current challenges, updates, and follow-up actions from the previous session. Thus the mentor and mentee can follow the progress of their meeting and mentoring relationship more easily.
- During the mentoring session, it is important to start with a short check-in. The check-in is informal and allows strengthening the connection between mentor and mentee. Everyone will feel more comfortable.
- After the check-in, the mentor and mentee decide together on a main focus for their conversation based on the agenda. The main focus can be outcome based, such as setting a goal and coming up with a plan for solving a problem, or exploration based, such as considering a new approach to solve something. When setting goals, it's important that mentor and mentee formulate positive goals, such as: finding a solution to problem X and not: avoiding Y to happen.
- Additionally, both mentor and mentee review the actions from the previous session, and discuss any open "homework". It is important that the mentor doesn't "tell off" the mentee if they didn't do something as agreed. Rather, the mentor and mentee can discuss openly and in a proactive manner why the activity was not completed, and decide if that is still a valuable action to be pursued. During this step, both mentor and mentee can update each other on the progress made.
- The next step is exploring challenges. The pair can explore any challenges the mentee is currently facing. The mentor can ensure that the discussion about challenges is proactive and positive, with a focus on learning and not on failure or weakness.
- Following the discussion about challenges, the mentor and mentee can create a plan and agree on a plan that offers possible solutions to the problems encountered.
- The next step is reflecting on progress. It is important to reflect on the progress made by the mentee. This could be through the discussion of key learnings, celebrating wins, and feedback.
- Before the session ends, both mentor and mentee should create a list with actions to do before the next session.
- The session closes with booking the next session.
- After the mentoring session, the mentee sends a follow-up with the key takeaways from the session, the list of actions, and the questions for the next session. The mentor can

respond with relevant information or link to resources that were discussed in the session that may help the mentee.

When put in practice, every mentoring session will vary. But it is important to have a suggested structure that increases the probability of making progress, keeping track of the steps made, and knowing there is a dedicated and safe opportunity to raise certain issues.

2 References

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3 Annexes

3.1 Written agreement between mentor and mentee (Template)

Dear Mentor and Mentee,

This template for an agreement can be used as a guideline for the first meeting. The purpose of the agreement is to clarify the goals and content of the mentoring programme and sessions and to define the framework for the collaboration during the mentoring programme. You can also modify these guidelines to suit your requirements.

We wish you a good start to your collaboration!

Written agreement on the organisation of the mentoring relationship
between _____ (mentor)
and _____ (mentee)

We agree on the following:

The mentoring cooperation is concluded for the period from _____ to _____.
The meetings will take place at the following intervals: _____.
Each meeting will take approx. _____ (30 to 90 minutes).
The initiative to arrange the meetings is/will be taken by _____
(mentor/mentee/both sides).

As the predominant type of contact we agree

- In-person meetings
- Telephone
- Email
- Online-meetings
- Other (please specify): _____

Goals:

We have defined the following goals for the mentoring programme for developing social entrepreneurship projects:





Topics / contents:

We have agreed on the following contents / topics:

We have agreed on the order and possible time in which the topics are to be dealt with and consider this to be a binding regulation.

Foundations for our tandem relationship:

We are both prepared,

- to respect each other's privacy and boundaries,
- to commit to keeping the content of our conversations confidential,
- and only discuss topics / content of our mentoring partnership with third parties if we have expressly agreed to do so,
- to continue the obligation to maintain confidentiality even after the mentoring programme has ended (if not agreed otherwise),
- to take responsibility for the success of the mentoring partnership,
- to seek support (e.g. from the coordination team) if problems arise,
- to always endeavour to provide open and constructive feedback

Contact information:

Mentee: Email..... Telephone.....

Mentor: Email..... Telephone.....

Place / Date:

Signature mentor:

Signature mentee:



3.2 Mentoring Record Form

The Mentoring Record Form is an easy-to-use template for recording the progress made by the tandem mentor-mentee.⁵ Usually, the mentor fills it in. It is a helpful tool for keeping track of the progress made, goals to achieve and next steps to take. It can also help to set up a more structured meeting agenda and make the most of each mentoring session.

The Mentoring Record Form can be filled during or after the mentoring session. It is recommended to complete it already during the session for a better planning and review of the achievements.

While there is no prescribed and required number of mentoring meetings, a suggestion for structuring the mentoring meetings can be of 6 meetings with the following topics:

Meeting 1 – 1 day idea generation and defining values + preparation

Meeting 2 – 1 day business canvas + preparation

Meeting 3 – 1 day financial planning + preparation

Meeting 4 – 1 day route to market + preparation

Meeting 5 – ½ day sourcing of funding + preparation

Meeting 6 – ½ day full draft + preparation

The mentoring meetings can be organized between one mentor and one mentee or teams of up to 5-6 mentees. The meeting results can be recorded on one mentoring form.

The suggested mentoring form below is designed along the **GROW** model/structure. It is one of the most widely used models:

Goal – where do you want to end up / get done

Current Reality – what happening now / is preventing you from getting there

Options – what options are available to you in meeting your goal

Will – what action will you do try out.

Depending on the number of participants, the time available, and the agenda of the meeting, the duration of a mentoring session can vary between 60 and 90 minutes.

⁵ This activity and the template for the Mentoring Record Form were proposed by Prof. Dr. David Dawson from the University of Gloucestershire, UK.



Mentee: Mentor: Date of meeting:	
Progress since last meeting	
Goals – where you want to get to	
Current Reality – what is happening now	
Opportunities – alternative ways of doing things	
Will – actions	