

IntegrAGE Living Learning Labs

piloting intergenerational learning and mentoring programme

TRAINING FOR MENTORS

Module 3: MENTORING METHODOLOGY

Duration: 180 min

SMART Training Goals:

1. Understand key stages of the mentoring process and relationship cycle
2. Learn structured approaches and tools for planning, conducting, and evaluating mentoring.
3. Gain insight into evidence-based methodologies applicable in different mentoring contexts.

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TRAINING STRUCTURE

SESSION 1: MENTORING PROCESS AND CYCLE

Participants complete the WS3 Pre Test Form (can be in paper or online)

1.1. Introduction (10 min)

It is very important to have clear understanding of what is mentoring.



Question for participants

What is mentoring for you?

Mentoring is a structured and intentional learning relationship that promotes the personal and professional development of both mentor and mentee. To achieve impact, the process should follow a clear and systematic cycle—from initiation to closure—ensuring shared understanding, measurable progress, and meaningful outcomes.

1.2. Understanding the Differences: Mentoring vs Coaching vs Training (20 min)

After the brief discussion question for participants is to state the difference between the mentor, trainer and the coach. Although these terms are often used interchangeably, they represent distinct approaches to learning and development. Recognizing their differences helps mentors apply the right method at the right moment.

Aspect	Mentoring	Coaching	Training
Primary focus	Long-term personal and professional growth; mindset, confidence, career direction	Short-term performance improvement and skill refinement	Transfer of predefined knowledge or technical skills
Relationship type	Partnership between experienced mentor and less-experienced mentee	Structured and time-limited facilitator	Instructor-participant relationship
Time frame	Medium- to long-term	Short-term or project-based	Limited to session or program duration
Approach	Non-directive, reflective, trust-based dialogue	Directive or semi-directive, goal-oriented	Highly structured, curriculum-driven
Key methods	Storytelling, feedback, reflection, goal-setting, networking, mentoring session	Questioning, feedback loops, performance tracking	Presentations, demonstrations, simulations
Outcome	Enhanced self-awareness, confidence, career progression	Improved performance and measurable results	Acquired knowledge and standardized competencies

Reflection Exercise (5 min)

Recall a situation where you supported someone's learning or development. Which approach did you use—mentoring, coaching, or training? Discuss briefly how your role and methods differed.

1.3. The Mentoring Cycle – Part 1 (60 min)

Every mentoring process follows a structured cycle composed of four key stages, each building upon the previous one. Understanding these stages helps mentors stay intentional, responsive, and effective throughout the entire relationship.

Stage 1: Initiation and Contracting

This first stage lays the foundation for a successful mentoring relationship. The goal is to establish a safe, open, and trust-based environment in which both mentor and mentee can grow.

Key objectives

- Estimate the needs and characteristics of the mentee to tailor the mentoring process to specific circumstances.
- Establish trust, psychological safety, and mutual respect.
- Clarify the purpose, expectations, and boundaries of the mentoring relationship.
- Agree on frequency, duration, and format of meetings.
- Define confidentiality and communication norms.
- Start exploring the mentee's learning style, motivation, and development needs.

Estimating the Needs and Characteristics of the Mentee

Before defining goals or action plans, it is essential for mentors to understand who the mentee is — their background, motivations, learning style, and current level of professional development. This helps mentors adjust their approach and communication style accordingly.

Suggested diagnostic questions for the first meeting

- What motivated you to join this mentoring program?
- Which areas of your professional or personal development do you wish to improve?
- How do you prefer to learn – through practice, discussion, or observation?
- What kind of feedback is most useful to you?
- How do you define success in your current professional role or life phase?
- How do you see the mentorship relationship?

Presentation of the Tool 1: Tool 1 - "Mentee Profile and Development Needs Form"

Tips for mentors

- Listen more than you speak during the first meeting – aim for 70% listening, 30% talking.
- Observe both verbal and non-verbal cues to understand personality and motivation.
- Avoid premature assumptions; every mentee's situation and pace are unique.
- Show genuine curiosity and empathy – the mentee should feel safe to share both ambitions and insecurities.

Stage 2: Goal Setting and Planning

Once the foundation of trust is established and the mentee's needs are understood, the next step is to translate insights into concrete, measurable goals and create a structured roadmap for the mentoring relationship. This stage transforms initial discussions into a shared plan that defines what success looks like for both mentor and mentee.

Key objectives

- Convert the mentee's learning needs into SMART goals, taking into consideration specific circumstances such as mentoring period, available resources, and organizational setting.
- Establish a structured action plan outlining topics, activities, and timelines.
- Align goals with the mentee's career path, organizational context, and personal motivation.

After identifying learning needs and priorities, the next step is to translate those broad intentions into SMART goals— goals that are Specific, Measurable, Achievable, Relevant, and Time-bound. This process ensures that mentoring remains realistic and aligned with available time, resources, and organizational context.

Steps to Convert Learning Needs into SMART Goals



1. Clarify the Learning Need

Start from what the mentee wants or needs to learn, not just what they want to “fix.”

Ask questions such as:

- ▶ “What knowledge or skill would make your work easier or more effective?”
- ▶ “What does improvement in this area look like in your daily tasks?”
- ▶ “How would success benefit you and your team or organization?”

Example: Learning need – “I struggle to give feedback to colleagues.” Clarified learning area – “Develop confidence and structure in giving constructive feedback.”

2. Translate the Learning Need into a SMART Statement

Use the SMART model as a checklist:

SMART Element	Guiding Question	Example
Specific	What exactly do you want to achieve?	“Provide clear, constructive feedback to team members.”
Measurable	How will you know progress is made?	“Give feedback after at least 3 meetings and receive peer feedback on clarity.”
Achievable	Is this realistic within mentoring period and resources?	“Yes – within 3-month program, using mentor’s role-play support.”
Relevant	Does it fit current role and organizational priorities?	“Yes – aligns with leadership development goal.”
Time-bound	When will it be completed?	“By the end of the third month.”

Smart goal example

“By the end of March, the mentee will provide constructive feedback to team members in at least three project meetings and receive documented peer feedback on clarity and tone.”

3. Check Contextual Feasibility

Evaluate each goal against specific circumstances:

Context Factor	Check
Mentoring Period	Can the goal reasonably be achieved within available sessions? (e.g., 3–6 months)
Resources	Are tools, access to colleagues, or data available to practice the skill?
Organizational Setting	Does workplace culture or policy support this activity? (e.g., opportunity to lead a meeting or project)

If any constraint is detected, adjust the scale or timeframe rather than discarding the goal.

Example Adjustment:

Original goal: “Design and implement a new communication policy.”

Adjusted goal (limited resources): “Prepare a draft outline for a communication policy and present it to supervisor for feedback.”

4. Document in the Mentoring Action Plan

Record each SMART goal, related activities, and timeframe in the shared mentoring plan.

5. Review and Adjust

- Check progress every 4–6 weeks.
- If new circumstances arise (organizational change, workload shift, extended absence), revisit goals and adjust time or scope.
- Celebrate partial milestones — momentum sustains motivation.

Exercise: Goal-Setting Practice

1. In pairs co-create 2 SMART goals.
2. Discuss whether each element meets SMART criteria.
3. Reflect: How do resource limits, timing, and motivation affect achievability?
4. Share examples and exchange feedback within the group.

Coffee Break (15 min)**SESSION 2: MENTORING PROCESS
AND CYCLE - CONTINUATION****1.4. The Mentoring Cycle – Part 2 (50 min)**

It is very important to have clear understanding of what is mentoring.

Mentoring Action Plan – 10 min

The Mentoring Action Plan (MAP) is the central working document of the mentoring relationship. It serves as a roadmap that translates the mentee's learning needs and development priorities into structured, achievable goals supported by specific actions, timelines, and indicators of progress.

Developing a clear action plan at the beginning of the mentoring process ensures that both mentor and mentee share a common understanding of direction, expectations, and responsibilities. It also helps maintain focus throughout the mentoring period and provides a practical tool for monitoring progress, evaluating results, and adjusting goals when necessary. A well-prepared action plan transforms mentoring from a series of conversations into a strategic learning process.

By completing the MAP collaboratively, mentors and mentees create a transparent learning framework that adapts to individual needs while remaining aligned with the broader goals of the program and organization. This living document should be regularly reviewed, updated, and used as a reference point in every mentoring session.

Purpose

- To convert identified learning needs into SMART goals and measurable results.
- To define clear roles, activities, and responsibilities of mentor and mentee.
- To ensure alignment with mentoring duration, available resources, and organizational setting.
- To provide a framework for ongoing reflection, feedback, and evaluation.

How It Works

1. The mentor and mentee complete the Mentoring Action Plan together after the initial meetings.
2. It becomes the foundation for session planning and progress discussions.
3. The plan is reviewed periodically to assess achievements, identify challenges, and adapt next steps.
4. It concludes with a joint evaluation of outcomes and future development directions.

Presentation of the Tool 2: Tool 2 - "Mentoring Action Plan"

Stage 3: Development and Learning (30 min)

Introduction

This is the most dynamic phase of the mentoring relationship — where learning, reflection, and growth occur through regular interaction. The mentor supports the mentee in applying new skills, gaining confidence, and facing real challenges.

Learning Objectives

- Conduct structured sessions that encourage learning and self-reflection.
- Use mentoring tools and methods such as GROW, feedback, and reflective questioning.
- Monitor progress and adapt learning focus when needed.
- Reinforce motivation through encouragement and recognition.

GROW MODEL AS A MENTORING TOOL

The GROW model is one of the most effective frameworks for structuring mentoring conversations. It provides a clear roadmap that guides the discussion from exploring the mentee's goals to defining specific, actionable steps for improvement.

The acronym **GROW** stands for:

G – Goal R – Reality O – Options W – Will (or Way Forward)

The purpose of GROW is to:

- Help mentors guide conversations logically and purposefully.
- Encourage mentees to take ownership of their own learning and problem-solving.
- Promote reflection, analysis, and action.
- Ensure each mentoring session ends with concrete, achievable outcomes.

Presentation of the Tool 3: Tool 3 - "GROW MODEL"

How to Apply to GROW Model in Practice

1. Use it as a session guide. Each mentoring conversation should touch on all four steps, even briefly.
2. Document outcomes. Note the agreed actions and review progress in the next meeting.
3. Balance structure and flexibility. GROW is a framework, not a script — adapt it to the mentee's style and situation. Encourage reflection. Let the mentee do most of the talking — the mentor's role is to guide with questions.

Tips for mentors

- Keep a neutral and curious tone. Avoid jumping in with solutions too early.
- Allow silence — it gives mentees space to think.
- End every session with clear next steps and accountability.
- Celebrate progress and acknowledge small achievements.

Stage 4: Consolidation and Closure (10 min)

Introduction

The closure stage celebrates achievements and ensures sustainability. It provides space for reflection on what has been learned, how both parties have grown, and how the mentee will continue development beyond the formal mentoring period.

Learning Objectives

- Review goals, achievements, and learning outcomes.
- Reflect on both mentor and mentee growth.
- Conduct final evaluation and identify lessons learned.
- Support the mentee's transition toward independence.
- Ensure formal closure and mutual appreciation.

SESSION 3: MONITORING AND EVALUATION OF MENTORING

1.4. The Mentoring Cycle – Part 2 (50 min)

Monitoring and evaluation (M&E) are not bureaucratic check-ups—they are learning tools that show whether mentoring creates real impact. They help mentors and programs stay accountable, maintain motivation, and recognize what works well. Its purpose is to help mentors understand how to track mentee progress, measure effectiveness, and use evidence to improve the mentoring process.

“Monitoring is not about control — it’s about understanding progress and celebrating development.”

Monitoring and evaluation (M&E) are essential components of every structured mentoring program. They ensure that the process remains purposeful, accountable, and development-oriented, while providing valuable information for both individual mentors and the wider organization. Without systematic monitoring, mentoring can easily lose focus or fail to demonstrate its true impact. Monitoring means tracking progress throughout the mentoring cycle, observing whether planned activities and goals are being achieved.

Evaluation, on the other hand, assesses the quality, effectiveness, and outcomes of the mentoring relationship—how much the mentee has learned, grown, and progressed, and how the mentor's support contributed to that change.

Together, they form a continuous learning loop that helps mentors, mentees, and program coordinators understand what works well, what needs improvement, and what lessons can be applied next time.

How the track success of the mentoring?

Dimension	Examples of Indicators
Engagement	Regular attendance, timely preparation, active communication
Progress	Completion of planned goals and activities, increased autonomy
Skill Development	Improved communication, leadership, time-management, or problem-solving
Satisfaction	Positive feedback from both mentor and mentee; perceived usefulness of sessions
Behavioral Change	Visible confidence, proactive approach, better collaboration with colleagues

The Monitoring Process

1. Plan – Identify what will be tracked (attendance, goals, skill development).
2. Collect – Document information after each meeting using session logs or notes.
3. Reflect – Discuss progress and challenges openly during sessions.
4. Review – Conduct mid-term evaluation to adjust goals or methods.
5. Report – Complete final review and share lessons learned with the program team.

Evaluation Questions

To guide reflection and measure results, mentors can use these sample evaluation questions at the last session:

- What goals were achieved or partially achieved?
- What new knowledge, skills, or attitudes did the mentee gain?
- What worked best in the mentoring relationship?
- What challenges or barriers appeared and how were they addressed?
- How will this experience influence future mentoring or career development?

SESSION 4: WS3 - WRAP UP

The wrap-up session helps mentors internalize knowledge, share insights, and evaluate their readiness to implement what they've learned. The purpose is to conclude the training by summarizing key lessons, reflecting on participants' learning experience, and identifying next steps for applying mentoring methodology in practice.

Open discussion using guiding questions:

- What are your three key insights from WS3?
- Which part of the mentoring cycle did you find most applicable to your context?
- What tool or method (e.g., GROW, SMART, Action Plan) you liked the most and why?
- How has your understanding of the mentor's role changed after this session?

Tool 4 - Personal Reflection - Mentor Readiness Checklist

After completion one final question is what support do you need to apply this knowledge effectively?

Participants complete the WS3 Evaluation Form, providing feedback on:

- Relevance and clarity of content.
- Usefulness of exercises and tools.
- Facilitation and overall satisfaction.
- Suggestions for future improvement.

Participants complete the WS3 Pre Test Form (can be in paper or online)