



# PROCARE

Professional Caregivers  
Burnout Prevention Initiative

## Trainer's Guide

### Module 6: Mentoring Review and Assessment

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## Using the PROCARE Trainer's Guide

The PROCARE Trainer's Guide has been designed specifically to support and streamline the delivery of the Vocational Education Curriculum developed in the context of the PROCARE project. The Curriculum constitutes a 3-day course, a total of 18 hours of training.

**Slide no. 1: Introduction**



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# PROCARE Project

## Preventing and Managing Burnout in the Field of Professional Caregiving

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**Trainer's Notes:**

Introduce yourself and dedicate some time to introduce learners to the PROCARE training course.

Describe the learning objectives of the course as well as Module 6; learners will be educated on:

1. The importance of Reviewing and Assessing the Mentoring Programme(s).
2. Train learners on the methods, logics and tools to be used in the Evaluation phases.
3. Train learners on how to implement Evaluation and Assessment.
4. To provide practical examples of Evaluation.

Give learners the opportunity to introduce themselves and ask about their expectations.

**Slide no. 2: About the PROCARE Project**



Module #: <Module Title>

## About the PROCARE Project

The PROCARE Project aims to train Managers of Long-term Care Institutions in becoming Mentors for their teams of Caregivers, supporting them in their efforts to prevent/manage Occupational Burnout.

### Project Results:

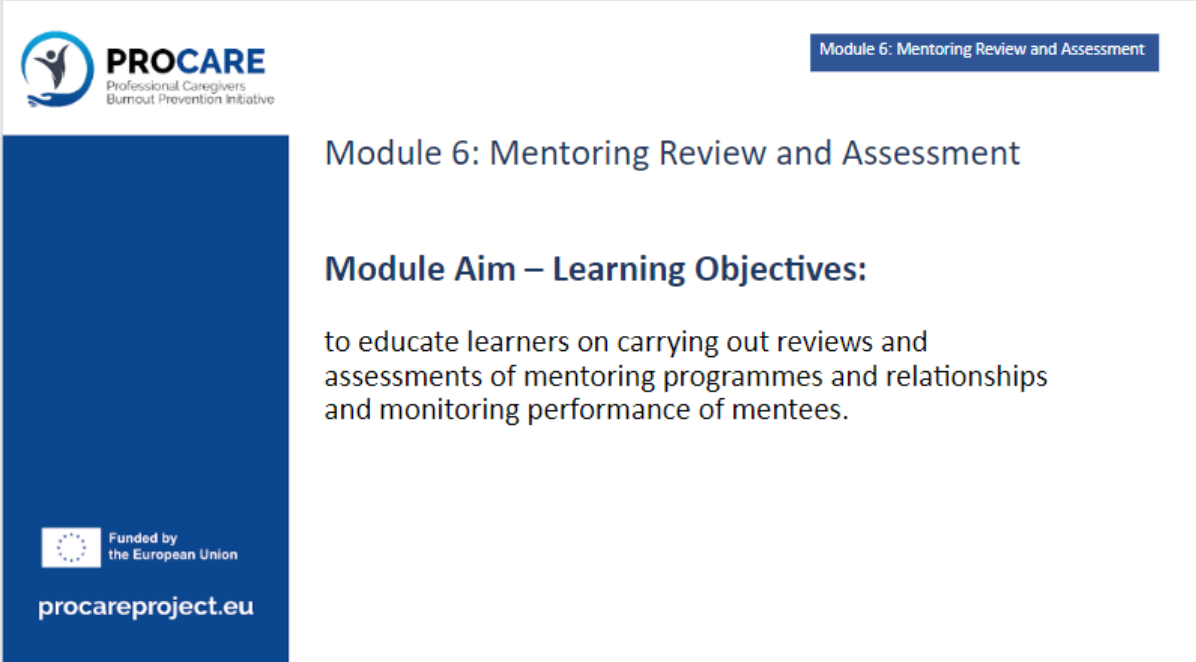
- Comprehensive Training Course and
- A Policy Paper
- Tools for Supporting Caregivers in Mentoring



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**Trainer's Notes:** Briefly introduce the Project and the Project Results and move on to the next slide.

**Slide no. 3: Module Aim**



The slide features a blue vertical bar on the left containing the PROCARE logo, the European Union flag, and the text 'Funded by the European Union' and 'procareproject.eu'. The main content area is white and contains the following text:

**PROCARE**  
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Module 6: Mentoring Review and Assessment

**Module 6: Mentoring Review and Assessment**

**Module Aim – Learning Objectives:**

to educate learners on carrying out reviews and assessments of mentoring programmes and relationships and monitoring performance of mentees.

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**Trainer's Notes:** Discuss the aim of the Module.

This last Module aims to educate learners on how to carry out a complete and valuable review of the Mentoring Programme. They will be provided with an overview of the methods and tools for the assessment of the quality and progress of the Mentorship programme.

## Slide no. 4: Learning Outcomes



### Module 6: Mentoring Review and Assessment

## Module 6: Mentoring Review and Assessment

### Learning Outcomes

1. Comprehend the importance of a multidimensional evaluation process, which includes the establishment of KPIs, the analysis of outcomes and the role of timing.
2. Gain competence on the Use of Related Tools in the context of Review and Assessment




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**Trainer's Notes:** Discuss the Learning Outcomes of Module 4

The two main outcomes of the Module consist of the (1) understanding of the importance of the whole evaluation process. By focusing on the reasons behind the importance of evaluating, the learners will also become familiar with the right methodology and the importance of precise and adequate instruments to use. The second outcome will be the gained competence to autonomously carry out the evaluation with different various tools (such as KPIs or the Procure Tools themselves, which have been better explained in Module 4) that can be available or that can be tailored to the context, situation, specific Mentoring Programme.

Slide no. 5: Contents




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Module 6: Mentoring Review and Assessment

## Module 6: Mentoring Review and Assessment

### CONTENTS

1. Introduction
2. **Why** a Review and Assessment process of a Mentoring Relationship?
3. Perform a **valid monitoring and assessment** phase
4. Using **Procure Mentoring Sessions tools** for evaluation
5. Summary
6. References




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**Trainer's Notes:**

Discuss the content of this Module and the logical steps of the discourse on the evaluation from the beginning to the end.

**Slide no. 6: Introduction**



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Module 6: Mentoring Review and Assessment

## Module 6: Mentoring Review and Assessment

### 1. INTRODUCTION

Review and Assessment is useful for the understanding of strengths, weaknesses and opportunities for improvement of the Mentoring Programme.

Review, Assessment and Evaluation need the proficient use of specific methods and tools (such as KPIs), and also an adequate interpretation of the collected data.



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**Trainer's Notes:**

Use this introduction phase to explain that this Module will talk about:

1. The importance of Review and Assessment to understand the strengths, weaknesses and opportunities for improvement of the Mentoring Programme;
2. The use of specific methods and tools;
3. The importance of Interpretation of the collected data.




## Slide no. 7: Evaluation - why is it important?



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### Module 6: Mentoring Review and Assessment

## 2. WHY Why a Review and Assessment process of a Mentoring Relationship?

- to be aware of what has been done, when and how,
- to understand if it has been effective,
- to deduce if the process was conducted correctly and with a sufficient quality level,
- to see what has to be changed, improved or adjusted and how.

### Trainer's Notes:


This part is about the “WHY”. Why Evaluation is needed? Why is it important?

Evaluating a mentoring relationship programme is important for a number of reasons (focus on these ones):


1. To be aware of what has been done - evaluation helps to document the progress and effectiveness of the programme, providing an opportunity to reflect on what has been achieved and what needs to be adjusted. Evaluation can provide insights into what has worked and what hasn't, which can help inform future decisions. It can also help identify areas where there is room for improvement..
2. To deduce if the process was conducted correctly and with a sufficient quality level - evaluation helps to ensure the programme is meeting its objectives, and that participants are receiving the support they need. It is also important to identify any issues or gaps in the programme that need to be addressed.
3. To assess what has to be changed, improved or adjusted and how to make the programme more efficient and effective.

In conclusion, evaluation is important for mentoring relationship programmes as it helps to measure progress and effectiveness, identify areas that need improvement, and ensure the programme is meeting its objectives.

#### Slide no. 8: Actors involved in evaluation


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### Module 6: Mentoring Review and Assessment

#### 2a. ACTORS INVOLVED

The 2 main ACTIVE actors are the MENTOR and the MENTEE

<u>PEER</u> EVALUATION	&	<u>SELF</u> EVALUATION
Mentor → Mentee		Mentee → evaluate him/herself and his/her own objectives and well being
Mentee → Mentor		Mentor → effectiveness of his/her approach

#### Trainer's Notes:

Explain that the subject/object of evaluation should vary depending on the type of evaluation that is needed or wanted. With peer evaluation the Mentor and Mentee evaluate each other and their relationship. With self-evaluation everyone evaluates his/her own experience, by assessing if the programme is working for him/her and if it is working/has worked to help him/her reach his/her objectives or expectations. Highlight the fact that there's no better evaluation method: both are very useful to have a broader perspective.

## Slide no. 9: Effectiveness and avoiding mistakes



### Module 6: Mentoring Review and Assessment

## Module 6: Mentoring Review and Assessment

### 2b. When an evaluation process can be effective?

Possible mistakes:

- unfair or biased evaluations
- use of ineffective or inadequate tools
- inadequate interpretations/analyses of collected data
- insufficient time dedicated to the evaluation processes



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### Trainer's Notes:

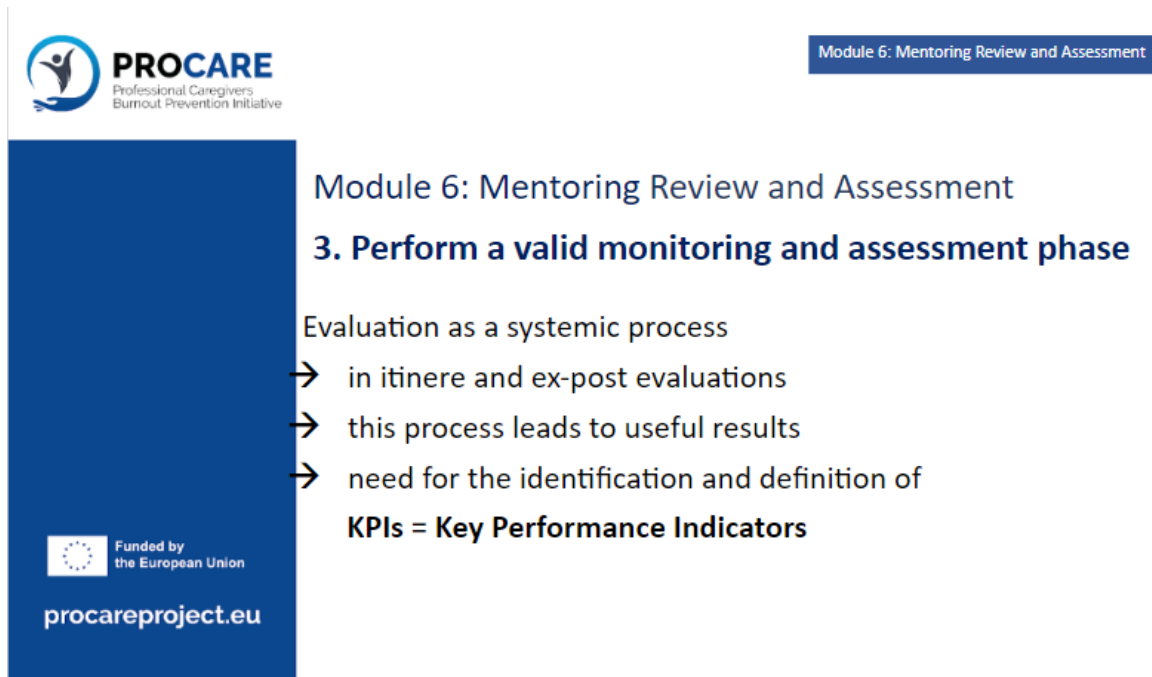
Explain to your learners the importance of avoiding these four possible mistakes when carrying out a valuable evaluation.

1. Unfair or biased evaluations: It is important to ensure that evaluations are conducted in a fair and unbiased manner.
2. Use of ineffective or inadequate tools: when evaluating, it is important to use tools that are effective and appropriate for the task. Using inadequate tools can result in an inaccurate and therefore useless or misleading evaluation.
3. Inadequate interpretations/analyses of collected data: When evaluating, it is important to ensure that all data collected is properly interpreted and analyzed. Without proper interpretation and analysis, the results of the evaluation may be inaccurate or misleading.



4. Insufficient time dedicated to the evaluation process: it is important to ensure that adequate time is allocated to the evaluation process. If the evaluation process is rushed, it may lead to inaccurate or incomplete (and therefore useless/misleading) results.

**Slide no. 10: Performing a valid evaluation.**



The slide features a blue background with white text. In the top left corner is the PROCARE logo. In the top right corner, a blue box contains the text 'Module 6: Mentoring Review and Assessment'. The main title 'Module 6: Mentoring Review and Assessment' is centered. Below it is the section header '3. Perform a valid monitoring and assessment phase'. The text 'Evaluation as a systemic process' is followed by three bullet points, each preceded by a right-pointing arrow. At the bottom left, there is a logo for the European Union and the text 'Funded by the European Union' and 'procareproject.eu'.

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Module 6: Mentoring Review and Assessment

Module 6: Mentoring Review and Assessment

**3. Perform a valid monitoring and assessment phase**

Evaluation as a systemic process

- in itinere and ex-post evaluations
- this process leads to useful results
- need for the identification and definition of

**KPIs = Key Performance Indicators**


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**Trainer's Notes:**


Explain to learners the importance of evaluation as a systemic process, in itinerary **and** ex-post evaluations are needed. This conception of the process leads to useful results and helps to identify and define adequate KPIs (Key Performance Indicators).

## Slides no. 11 and 12: KPIs



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**Module 6: Mentoring Review and Assessment**


**3a. What are the Key Performance Indicators (KPIs)**

“Key Performance Indicators are the critical **quantifiable** indicators of **progress toward an intended result**. KPIs provide a focus for **strategic and operational improvement**, create an analytical basis for decision making and help focus attention on what matters most. Managing with the use of KPIs includes **setting targets** and **tracking progress towards those targets**.”



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**Module 6: Mentoring Review and Assessment**

**3a. What are the Key Performance Indicators (KPIs)**


Good KPIs...

- Provide objective evidence of progress towards desired results.
- Measure what is intended to be measured to help inform better decision making.
- Offer a comparison that gauges the degree of performance change over time.
- Track efficiency, effectiveness, quality, timeliness, governance, compliance, behaviours, performance or resource utilisation.
- Help identifying a balance between leading and lagging elements or aspects.

### Trainer's Notes:


Explain to learners what are the KPIs and the criteria and logics that make KPIs **good** KPIs. These features of KPIs also help the learner to understand how KPIs are useful, all the benefits they can provide for the understanding of the various elements of the Mentoring Programme and how to design these KPIs for the needed evaluation.

## Slides no. 13 and 14: KPIs and OKRs



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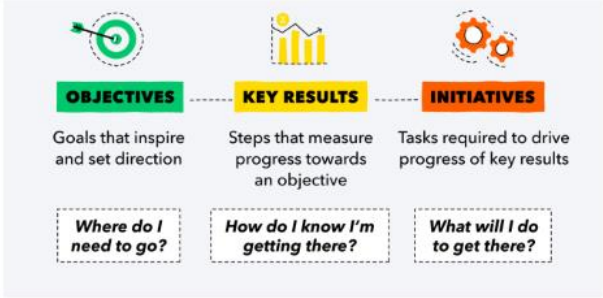


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### Module 6: Mentoring Review and Assessment

#### 3a. What are the Key Performance Indicators (KPIs)

OKRs = Objective and Key Results



**OBJECTIVES** → **KEY RESULTS** → **INITIATIVES**

Goals that inspire and set direction      Steps that measure progress towards an objective      Tasks required to drive progress of key results

*Where do I need to go?*      *How do I know I'm getting there?*      *What will I do to get there?*



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### Module 6: Mentoring Review and Assessment

#### 3a. What are the Key Performance Indicators (KPIs)

Methodological remark: differences between KPIs (Key Performance Indicators) and OKRs (Objective and Key Results)

**KPI**

WEDDOME

**Key Performance Indicator**

- Business metrics reflecting performance
- Sets the performance level to be achieved
- For performance management and measurement
- Not changeable on a regular basis
- Monitors the steady state & provides benchmarks
- Leadership led / Top-Down

**OKR**

**Objectives & Key Results**


- Goal-setting method to improve performance & drive changes
- For alignment, engagement and focus
- A specific area of improvement to focus on
- Frequently set, adaptive, tracked and re-evaluated
- Informs everyone on what's important to achieve company goals
- Bottom-up & Top-Down

**Trainer's Notes:** Explain to the participants what are the OKRs and the differences between these and KPIs.

OKRs are about the identification of Objectives and Key Results. They are more about guidance and have broader meaning, while KPIs focus on the assessment of specific dimensions and elements of the

Mentoring Programme to be evaluated. Use this tab to better transmit the concepts and the features that distinguish KPIs from OKRs.

**Slide no. 15: Different types of indicators: quantitative and qualitative.**




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## Module 6: Mentoring Review and Assessment

### 3b. How many different indicators can be considered?


<u>QUANTITATIVE</u> measurements with numeric values against a standard Examples: <ul style="list-style-type: none"> <li>- share of participants who reached at least one of the objectives during the programme;</li> <li>- tot. amount of reached objectives compared to the tot. amount of pre-established objectives;</li> <li>- share of participants who state the programme contributed to: increasing their self-confidence, improving their wellbeing at workplace.</li> </ul>	&	<u>QUALITATIVE INDICATORS</u> to understand non-numeric conformance to a standard. Qual. Ind. include: interpretations of personal feelings, tastes, opinions, or experiences. Examples: <ul style="list-style-type: none"> <li>- narratives from participants on what differences the mentoring made to them.</li> <li>- stories about how mentoring helped them.</li> <li>- narratives from mentors on what differences the mentoring made to the beneficiaries and on what can be the benefits of Mentorship for Mentors themselves.</li> </ul>
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**Trainer's Notes:** Discuss the differences between quantitative and qualitative indicators. Ask the participants their thoughts and opinions about what could be the differences between quantitative and qualitative indicators, which can be the different things that these indicators help to focus on and then explain the actual differences and logics of the two methodologies also by providing examples.

Slide no. 16: How many indicators can be considered, and depending on what.




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## Module 6: Mentoring Review and Assessment

### 3b. How many different indicators can be considered?

The Evaluation strategy should be set in the **preparatory phase** of the Mentorship → objectives and goals are elaborated in this phase and so should be the indicators that have to be tailored to the measurement of these objectives and goals



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#### Trainer's Notes:

Discuss with the participants when could be the most appropriate moment when to establish the indicators and explain that it should be done in the preparatory phase of the whole Mentoring programme, because they have to be tailored on the objectives and goals that are established at the very beginning. Highlight the fact that objectives, goals and therefore the indicators can be adjusted and modified in progress, if there are reasonable justifications.



Slides no. 17, 18 and 19: Type of indicators

Module 6: Mentoring Review and Assessment

**3.c. What type of indicators can be used in reviewing and assessing a Mentoring Relationship?**

The evaluation of the Mentoring Relationship usually focuses on 2 aspects:

1. the degree of implementation of the initiative,
2. whether or not the individual participants have achieved the desired results.

Module 6: Mentoring Review and Assessment

**3.c. What type of indicators can be used in reviewing and assessing a Mentoring Relationship?**

Potential KPIs:

1. **Aims** indicator → definition of objectives
2. **Communication** or **Engagement** indicator → quantity and quality of communication exchanges and means
3. **Trust** indicator → level of confidentiality Mentor/Mentee
4. **Process Monitoring** → monitoring of time and duration

## Module 6: Mentoring Review and Assessment

### 3.c. What type of indicators can be used in reviewing and assessing a Mentoring Relationship?

Potential KPIs...

5. **Learning/Development** indicator → comparison between number of goals set and number of goals achieved and personal satisfaction score.
6. **Satisfaction** score → asking for feedback by involved actors
7. **Retention** indicator → to monitor the eventual success of the mentoring programme as a whole
8. KPIs related to the monitoring of the burnout syndrome and its phases.

**Trainer's Notes:** Discuss the potential types of indicators.

At first, it's important to set the two dimensions of evaluation, i.e. the monitoring of the progress, namely the attestation that the process is going on following the pre-established timetables. Then, you provide examples of possible KPIs following the list provided.

Discuss with the participants about them, by focusing on why and in which phases they can be helpful, what type of information they can provide and how accurate this piece of information can be and for what.

Discuss with the participants about other possible reasonable kinds of indicators they can think of.

## Slide no. 20: Type of indicators and phases

### Module 6: Mentoring Review and Assessment

#### 3.c. What type of indicators can be used in reviewing and assessing a Mentoring Relationship?

It is suggested to use and build a measurement framework in which actors will be able to collect, in a logical way, outputs, results, indicators, changes, methods for data collection, sources and timeframe.

It is particularly relevant in this context keeping in mind that results can be divided into:

- immediate,
- mid-term,
- long-term benefits



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#### Trainer's Notes:

Discuss with the participants about the overall framework that should be elaborated at the beginning of the Mentoring programme that contains the evaluation strategies with the appropriate indicators.

This framework should be consistent and coherent and it should include the strategies that should be

implemented to assess the programme at every phase, with an additional focus on the outcomes that can be seen and preferably measured on the short-, mid- and long- term.

## Slides no. 21 and 22: Using the PROCARE Mentoring Session Tools for evaluation

### Module 6: Mentoring Review and Assessment

#### 4. Using Procure Mentoring Sessions tools for evaluation

##### 4.a. Procure toolkit: not just an implementation instrument


Some of the instruments developed by Procure are, for intrinsic nature, useful to evaluate progress in the mentoring process (not just to implement it), for example:

- Mentor and Mentee Diary
- Self-monitoring tool
- Mentoring Agreement → setting of SMART goals as an indicator
- SWOT Analysis
- Skill Map
- Grow Model



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**Module 6: Mentoring Activities and Tool Uses**

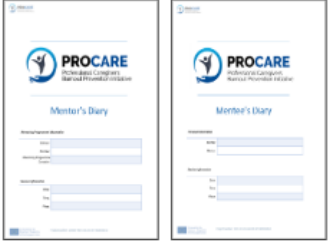
**Mentoring Agreement Contract Tool**



**Self-Monitoring Tool: example  
Emoji Cards or Event Cards**



**Mentor/Mentee's Diaries**



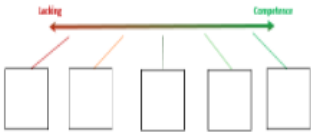
**Setting of SMART Goals:**


Specific  
Measurable  
Achievable  
Realistic  
Timely

**SWOT Analysis**

Strengths	Weaknesses
Opportunities	Threats

**Skills Map**





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### Trainer's Notes:

Discuss with the participants about the Procure Mentoring Session Tools, ask them how they think these instruments can be useful also for evaluation purposes. Then, explain and deepen with practical and concrete demonstrations how they actually can be used.

For example, the Skills Map can be used as an evaluation tool since it visually shows the levels of self-perceived competence in specific sectors. If the Mentee is required to fill it out at the beginning, half-way and at the end of the Mentoring programme, progress can possibly be seen: whether the Mentoring programme started with the establishment of the goal of increasing competence in a specific area this can be the most appropriate tool to see if the Mentoring is been successful or has been successful. Moreover, it must be said that this instrument can be used not only as a self-evaluation tool, but it can also be used by managers that already have specific objective indicators to measure competences in specific areas and may be able to evaluate the level of competence of the Mentee at every stage of the Mentoring programme.

Slide no. 23: Instruments to collect data.

## Module 6: Mentoring Review and Assessment


### 4.b. Which instruments can be used in collecting data?

- SURVEYS → for both QUALITATIVE and QUANTITATIVE
- Organisational HR Data → retention and promotion rates
- Feedback session(s)

**Trainer's Notes:**

Discuss with the participants about the instruments to collect data. Explore their suggestions and provide them with information about the tools of this list. Explain that surveys can be used to collect both qualitative and quantitative information, depending - for example - on the quantity of questions and their features: open questions lead to more qualitative feedback while closed (multiple choice or Likert-scale based) questions are more suitable for quantitative collection of data. There's also data from Organisational HR and all the materials that is produced in the Feedback Session(s).

**Slides no. 24 and 25: Time for Evaluation**


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Module 6: Mentoring Review and Assessment

## Module 6: Mentoring Review and Assessment

### 4.c. When is the time for evaluation?

Review and Assessment of a Mentoring Relationship should be carried out during the whole period of its implementation, based on a shared schedule between Mentors and Mentees, using different type of tools adapted to the moment in time.

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## Module 6: Mentoring Review and Assessment

### 4.c. When is the time for evaluation?

Suggestions:

- **BEGINNING:** to devise an **agenda** for evaluation in the first phases of of the Mentoring process → clear **milestones** for the actors to work towards and to use as benchmarks for evaluation. (The Mentoring Agreement should collect and include this timeframe)
- **MEANWHILE:** to use the Procure Mentoring Sessions tools for having a **continuous assessment** such as the Diary. This tool being filled out after every session can be used to monitor improvements and quality of the relationship.
- **END:** **last final evaluation** should be run, where the subjects will be the achievement of career goals, the improvement of job satisfaction and awareness about the burnout syndrome, its risks and how to avoid it

#### Trainer's Notes:

Trainer should remind trainees that Evaluation is not just a final step of the mentoring, but it should be carried on throughout the whole Mentoring process.

#### Slide no. 26: Summary

## Module 6: Mentoring Review and Assessment

### 5. Summary

- Importance of including a Review and Assessment process in a Mentoring programme
- Many actors are involved in Review and Assessment, mainly Mentors and Mentee, but also other stakeholders
- KPIs tend to measure performance of both the actors (Mentor and Mentee) as well as the Mentoring relationship itself, some examples have been given
- Mentoring Sessions Tools devised by the Procure Project are not just helpful in carrying-out a successful mentoring relationship, but can be also taken as an instrument for monitor, review and assess the process of mentoring and the outcomes produced
- Importance of setting a shared timeframe to be aware that an evaluation must be performed and it is vital to execute it during, half-term and ex-post.



**Trainer's Notes:**

Retrace with the participants all the topics addressed in this Module.

Discuss with the participants about what they learned about Evaluation.

Exploit for this time to leave the floor to comments, discussion, clarifications and feedbacks. This can be a debriefing moment, beside a moment for questions and clarifications of the concepts that may have been difficult for the participants.