



## Qualitative Services at local level for Emigrants and Refugees

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Deliverable IO4

# The Circular Cycle of Mentoring Model: Step 3

Contributors Drosostalida  
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# List of Authors

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Drosostalida	SOCIAL COOPERATIVE ENTERPRISE DROSOSTALIDA

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## Q-SER Consortium

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The Q-SER Consortium consists of:

MUNICIPALITY OF EGALEO	Greece
IOM Mezinárodní organizace pro migraci v Praze	Czech Republic
INTRACOM GMBH	Germany
MEDIA CREATIVA 2020, S.L.	Spain
SOCIAL COOPERATIVE ENTERPRISE DROSOSTALIDA	Greece
ECUMENICAL PATRIARCHAT – GREEK – ORTHODOX METROPOLIS OF GERMANY – COMMUNITY THE ASCENSION IN STUTTGART	Germany
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# 1. EXTERNAL PROFESSIONALS WORKING AS MENTORS — AN ONLINE DATABASE. JOB SHADOWING ACTIVITIES

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As an organisation might be small in numbers or not acquire the necessary mentor candidates, it may cooperate with external professionals to work as mentors. In this case, an online database should be designed where interested professionals can submit their application to work as mentors.

The preparation phase:

1. Online system readily available to allow for submission of applications. The profile pictures should be similar to the in-house mentoring application process.
2. The external professionals should have access to a user manual of the system in order to fully explore its capabilities,
3. Communication tools: the online system should cater to provide online communication tools such as a discussion forum for closed and open group chats, a chat room function and possibly an internal mail system to keep a record on the communication between the pairs.
4. The profile application template of the mentor should be drafted by the organisation and the responsible for the mentoring process, in order to cater for internal processes, interests, needs and functions.
5. In case of need, workshops can be organized for the external mentors to participate and provide expertise and know-how as consultants to other mentoring couples or as consultants to both the organisation and a mentee. The structure of the workshop follows the one specified in the IO3. During the workshops, specific scenarios of use will be discussed and in IO4, there are several real-case scenarios available to be used as examples.

In addition to the training material, the Q-SER project has a secondary, support structure that of the job shadowing to prepare future mentors. The job shadowing programme available consists of several tools and methods preparing one person to conduct job shadowing as part of the mentoring process. The job shadower can either be a trainer or a person who has training providing experience.

The tools (files) available in the job shadowing section are:

- General information on job shadowing
- Steps needed by an organisation to adopt job shadowing
- Setting up a training path for job shadowing
- Checklist for trainers conducting job shadowing

Job shadowing is an excellent technique for direct and immediate feedback and evaluation of an employee's work. The results of the constructive criticism can be directly applied in the work position and daily routine, rendering it a very successful combination with mentoring.



## 2. SUGGESTED USEFUL TOOLS

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### 2.1. Steps taken by an organisation to organize job shadowing

When a Job Shadowing activity has been scheduled by an organization, whether it is public or private, there are certain steps needed to be followed to complete the process.

**Step 1.** Meeting trainer- Job Shadower and the interested organisation. The trainer-job shadower can be part of the organisation if they have undergone the proper training, either in-house or in an external vocational training provider.

**Step 2.** The organization selects the proper trainer for the project. Once the case has been analysed and the trainer selected, a contract (formal or informal can be signed).

**Step 3.** The organization informs trainer on the job shadowing project at hand in order for them to prepare. Meetings with the target group might be needed. A template for reporting should be drafted to keep minutes of the process and the possible meeting.

**Step 4.** The trainer designs the training path that is optimal for the person or group at hand. This training path can be designed on a generic template (see Annex Training Path Example. The generic features included should be the title of the training, the requested or required training skills and competences, number of participants and duration of the training – job shadowing provided.

**Step 5.** First meeting between representatives of the organisation, the trainer and the department manager. Make sure to record the meeting minutes and the skills, competences or attitudes needed to be enhanced.

**Step 6:** Trainer designs the training path and discusses this with the organisation to confirm. Once confirmed, the trainer can start the participants for the job Shadowing activity to a meeting or if they are many, to an explanatory workshop.

**Step 7:** Meeting between all interested parties and in case of a workshop, its organisation.

If a workshop is organised, the following points should be discussed and presented:

- Introduction of workshop and job-shadowing activities
- Check list with questions to be discussed
- Objectives of the job shadowing and Q&A session to complete it. The workshop should not be very long.

**Step 8:** Following the workshop, the trainer – job shadower completes the checklist and signs it off with the organisation.

**Step 9:** Job Shadowing activities begin and the trainer keeps a dairy. Before the first session, the trainer and the job shadowed staff should answer the following questions together:

- Where are they to be positioned in the room where the work takes place

- What would they hold
- Which are the most typical work situations dealt with

**Step 10:** The trainer needs to calculate all job shadowing hours spend in their dairy. Moreover, they should organise a rotating scheme of job shadowing activity and reflection time.

**Step 11:** The trainer needs to inform on a regular basis the organiation on the staff's progress and activities

**Step 12:** when training / job shadowing has been complete, the trainer organises a final closing workshop and drafts the final report.

**Step 13:** Trainer concludes with the organisation on the benefits and skills, competences or attitudes promoted during the job shadowing activity and how this has benefitted and provided impact to both organisation and staff.

## 2.2. Training path – job shadowing

Training path: *“Positive and informed customer service”*

1. **Organisation details:**
  - a. Name of contact person
  - b. Address and email
2. **Trainer contact details:**
3. **Title of the training / job shadowing activity**  
*“Positive and informed customer service”*
4. **Required training skills and competences. For example:**
  - a. Serve immigrants with respect and understanding
  - b. Effective communication and patience
  - c. Understanding of body language
5. **Number of participants and duration of training / job shadowing i.e.**
  - a. Months
  - b. Weeks
  - c. Hours
  - d. Names of participants
6. **Training / job shadowing activities, i.e.**
  - a. work related

- b. Workshop
- c. Discussion etc.

### 2.3. “Job shadowing” in Q-SER

According to the Business Directory definition, job shadowing is “An educational program where college students or other adults can learn about a particular occupation or profession to see if it might be suitable for them. In job shadowing, a business typically partners with an educational establishment to provide an experience for a person (student/staff/etc.) of what it is like to perform a certain type of work by having them accompany an experienced worker as they perform the targeted job”.<sup>1</sup>

In the Q-SER project, job shadowing will be used in the context of IO4 where mentors having completed the training online (Learning management system), will guide and support other staff to become mentors themselves. In cooperation with a trainer, the mentors can job shadow staff and help them up-skill and gain new competences as to follow the organisation strategy in any given topic. In the IO3 and IO4, the example topic and working hypothesis is “Communication”.

The job shadowing described can be considered a training concept specifically designed to work on working activities and processes. Both large and small businesses reach a point where training needs to be individualized and specific role functions need to emerge. One such role is the mentor or e-mentor in case training is online. The job shadower helps the employee improve their skills and competences while all the training occurs within the organisation and during business hours.

As a training concept, the job shadowing:

- Is focused on specific needs for specific employees taking place within the organisation
- Allows for intervals of training, observation and application with the participating employees

At the same time

- ✓ Skills gained can be directly applied in the work process thus, results are directly visible, and impact can be measured.
- ✓ The employee can identify the relevance and importance of the new skill but also evaluate its importance.

Also, through a rotation and interval application method, the workflow within the organisation is not impaired, allowing the staff and managers to continue work without losing working hours, while staff and mentors learn from each other and create a relationship based on trust and motivation to learn, thus, fostering lifelong learning aspects.

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<sup>1</sup> <http://www.businessdictionary.com/definition/job-shadowing.html>

### Main principles of the Q-SER job shadowing training technique

The Q-SER job shadowing training technique is based on the following principles of work. These principles should be designed together with management, training department or HR department and with representatives from the application department.

#### **Principle 1: In-house training**

It is imperative to provide this training in-house since in larger organizations or in public ones, the training usually is committed by external training providers outside the organisation. Having the training internally and through the job shadowing, the trainer focuses on the exact training needs required by the staff in question. The staff member learns on the job and can directly apply comments, suggestions and new skills on their work routine in small steps or using a step by step guide.

#### **Principle 2: Learning on the job**

Learning on the job is one of the most successful methods of training and most optimal for this type of training involving sensitive target groups. The staff is trained while doing their routine work and are analysed on their actual working processes and attitudes of work. Together with the job shadower, they can discuss approaches and try new ones for immediate results. The trainer can distinguish certain situations i.e. how they handled one customer and emphasise one training session on this.

#### **Principle 3: Individual training**

By providing individual training, the impact is greater and direct. The organisation will find that fewer hours are usually required to provide the training rather than sending the staff to generic training courses in 3<sup>rd</sup> party training organisations. The trainer / job shadower works directly on specific skills and on specific competences, rendering this type of training very successful and to the point.

#### **Principle 4: Effect and impact**

The most common reaction by staff participating in job shadowing activities is that it was very direct and very personal. The approach used and the guidelines for the work activities can be directly applied in smaller bits, thus, really helping the staff member to change the way they usually work, with the support of a trainer. The immediacy of results is the main motivational factor recognized and allows the staff member to slowly change and adopt company strategy. For the organisation, the results of the training are immediate and direct. The department manager can from day 1 view changes in attitudes, skills and staff performance.

### How can the job shadowing be organized – Proposition for the Q-SER project

Job shadowing is optimal when customers, customer service, sales, marketing or client – company interaction is involved. The QSER project can benefit greatly from this experience and type of training since many of the target group members who will be trained are in direct contact with the QSER target group, immigrants and refugees. The municipality staff will through the QSER project be trained:

- In 3 online modules related to dealing with the selected target groups (IO2)
- Through several workshops in mentoring topics and what it means to work with mentees
- Through the IO3 guidelines and tools in setting up working structures between them and the organisation
- Through IO4 in becoming mentors and e-mentors and using Job shadowing techniques.

The Q-SER proposition allows for staff who has completed the online training to also become job shadowers. The job shadower should have a trainer's background and have experience in training provision.

## 2.4. Setting up a job shadowing session

Prior to any initial analysis of the work at hand and the staff member or members to be trained, the trainer must be able to self-reflect and answer the following questions:

- Can I teach the training skills that are required?
- Have I got enough background knowledge of the staff member, the organisation and the work activities at hand?
- Have I got enough information on how immigrants / refugees should be handled?
- Do I have the correct competences:
  - o High communication skills for clear communication
  - o Be able to gain employees confidence
  - o Be able to find the correct balance between employees, organisation and training
  - o Focus on solutions rather than the problems
  - o Have the necessary flexibility to conduct job shadowing
  - o Be confident enough to conduct job shadowing

Once the above are answered, the trainer can view the annex "*Steps taken by an organisation to organize job shadowing*" which are steps specifically described to help a trainer work as a job shadower.

For the Q-SER project job shadowing session

1. The trainer with the organisation and staff member should identify what needs to be trained i.e. which skill and competence. They can discuss and analyze expertise, know-how, ways of work to understand the exact needs involved when dealing with immigrants and refugees within the organization's different departments. Involving the actual staff will allow for their motivation and active participation in the training. Strive to answer the following
  - a. What are the goals that need to be completed?

- b. Which competences and skills are needed to be achieved?
  - c. Which timeframe do we have?
2. Actual job shadowing session occurring: the trainer follows the staff member to their work. They stand somewhere not visible to other customers and observe how the staff member is conducting everyday business and customer service. Following a period of time, the trainer discusses privately, with the staff member on how the work was done, any issues that were evident and provides direct and specific feedback on customer service issues noticed. The trainer should provide specific suggestions to the staff member to follow. The trainer leaves and the staff member return to their work immediately implementing the suggestions.
3. The trainer job shadows the staff member again after 3-4 days of interval, specifically looking after how and if their suggestions were implemented. The staff member conducts work as usual and after a while, the session between them starts. The topic of discussion can be the same or they can focus on a new skill if the trainer is satisfied.
4. The steps above are repeated as necessary as the contract specifies.

## 2.5. Checklist for the trainer job shadower

In this section a possible template for the checklist of the job shadower is resented. The questions needed to be answered will help them finalize the training path and which skills and competences to work on with the trainee / staff.

### **Title: Positive and Informed Customer service**

#### **Presence in the reception area**

- Noticing customers / immigrants
- Active welcoming of them
- Keep a natural smile
- Type of communication with customers identified

#### **Listening skills**

- Eye contact maintained
- Open stance
- Body language
- Questions and responses given

**Customer approach**

- Is there a personal approach maintained?
- Do you address the customer correctly?
- Are you friendly?

**General**

- Does the customer feel safely understood i.e. are the questions and answers clear?
- Does the customer feel safe to reply or further question?
- Type of language used
- Type of documentation used
- Kind of voice used i.e. positive, kind, understanding, patient

**Documentation**

- Are the proper documents, forms, templates etc. presented to the customer?
- Do they need help, support in filling them out?
- Is there a possibility to offer more documentation for help?

**Closing**

- Was the closing friendly
- Was an offer for additional help provided?
- Were there any complaints? If yes, where they dealt in a professional manner?