**#Mentor4WBL@EU**

**ERASMUS+ Strategic KA2 Partnership**

**Project No. 2018-1-EL01-KA202-047778**

[www.mentor4wbl.eu](http://www.mentor4wbl.eu)

**IO3-A2**

**EU EFCoCert 3001: EU WBL Mentor Competence Certification Scheme – Requirements**

**Stage: Final Draft Standard**

Start date of project: 1 October 2018

Duration: 24 months

**Summary**

[Foreword 3](#_Toc27819449)

[0 Introduction 4](#_Toc27819450)

[1 Scope 5](#_Toc27819451)

[2 Normative references 5](#_Toc27819452)

[3 Terms and definitions 5](#_Toc27819453)

[4 Requirements for WBL Mentors 5](#_Toc27819454)

[4.1 General 5](#_Toc27819455)

[4.2 Prerequisites 5](#_Toc27819456)

[4.3 Competence requirements 5](#_Toc27819457)

[5 Code of conduct 5](#_Toc27819458)

[6 Certification exam 5](#_Toc27819459)

Annex A - EU WBL Mentor Competence Matrix 6

ANNEX B - EU WBL Mentor Code of Conduct 9

ANNEX C - EU WBL Mentor Competence Exam 10

# Foreword

See EU WBL Mentor 3000 (will be copied at final version stage).

# Introduction

See EU WBL Mentor 3000 (will be copied at final version stage).

**EU WBL Mentor Competence Certification Scheme – Requirements**

# Scope

This normative document specifies requirements applicable for a WBL Mentor aiming to obtain or maintain certification against the EU WBL Mentor competence certification scheme.

# Normative references

The following documents, in whole or in part, are normatively referenced in this document and are indispensable for its application. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

EU EFCoCert 3000 – EU WBL Mentor Competence Certification Scheme – Fundamentals and vocabulary

# Terms and definitions

For the purposes of this document, the terms and definitions given in EU EFCoCert 3000 apply.

# Requirements for WBL Mentors

## General

The certified WBL Mentor shall meet requirements in terms of:

1. prerequisites, and
2. competences.

## Prerequisites

The WBL Mentor shall meet the prerequisites specified in the following table.

|  |  |  |
| --- | --- | --- |
| **Specifications** | **Requirements** | **Mandatory** |
| 1. Education level
 | ≥ vocational school graduation≥ EQFLevel 4≥ of the mentee at the end of the mentored WBL | YesYes Yes |
| 1. Work experience
 | * overall work experience, of which
* within WBL context as WBL Mentor
* within the mentoring technical sector
 | ≥ 3 years ≥ 1 year≥ 1 year |
| 1. Mentoring experience
 | * WBL mentoring experience within the last 2 years
 | ≥ 4 |

## Competence requirements

The WBL Mentor shall demonstrate compliance with the competence requirements specified in Annex A.

# Code of conduct

The WBL Mentor shall commit to the Code of Conduct given in Annex B.

# Certification exam

By applying to certification or accepted being certified, the WBL Mentor shall read and accept the examination process and procedures described in Annex C.

**ANNEX A**

**(Normative)**

**EU WBL Mentor Competence Matrix**

The present EU WBL Mentor Competence Matrix:

* is structured according to the Deming continuous improvement PDCA cycle (Plan, Do, Check, Act) applied to the mentoring process,
* encloses 12 key competences (numbered 1 to 12) for which evidence shall be demonstrated, whereby
* each key competence is illustrated by examples (numbered a) to x) of abilities demonstrating good practices or evidence.

**PLAN - Preparation and induction**

* 1. **Analyse the context – Ability to**
		1. demonstrate understanding of the school's VET needs
		2. understand the WBL Mentee’s profile, learning style and most efficient way of learning
		3. identify the company's expectations
	2. **Plan WBL objectives and actions to achieve them – Ability to**
		1. plan realistic, measurable and consistent with the WBL Mentee’s needs learning outcomes
		2. determine and arrange feasible action plans of learning scenarios for achieving the WBL objectives
		3. identify and plan the necessary resources to perform the mentoring process
		4. define together the VET tutor and the Mentee the optimal skills transfer plan

**DO – Mentoring**

* 1. **Socialize the Mentee – Ability to**
		1. prepare the welcoming pack and ensure mutual commitment to a productive relationship
		2. provide information about company’s profile and culture
		3. explain company's policies and procedures
		4. ensure a sound social and behavioural integration within workers and Mentee
		5. act as liaison with stakeholders involved in the mentoring process
		6. promote the relationship between the Mentee and his school
	2. **Professionalize the Mentee – Ability to**
		1. transmit vocational knowledge, experience, know-how, and competences
		2. professionalize the Mentee and promote his employability
		3. support and empower the Mentee towards independent self professional development/professional autonomy
		4. facilitate creative thinking, problem solving and working culture to address the Mentee's needs
		5. ensure transferability of knowledge and competences in other workplaces
		6. advise the WBL Mentee on matters related to work
		7. perform as a role model and subject expert resource
	3. **Implement effective mentoring practices – Ability to**
		1. ensure effective coordination & implementation of the agreed WBL plan
		2. apply Adult Education/Andragogical principles during mentoring practices
		3. assist the WBL Mentee to carry out classroom assignments related to the job and implement them on real working conditions
		4. keep records on Mentee’s personal learning log/recording system according to the framework (e.g. contract, learning diary)
		5. demonstrate appropriate digital literacy and skills

* 1. **Develop a productive mentoring relationship – Ability to**
		1. recognize and build upon abilities of the mentee to nurture a productive relationship
		2. manage this relationship for achieving mutual benefit
		3. encourage positive changes based upon strengths
		4. apply creative communication tools and techniques to establish trust and open communication
		5. support the mentee through identifying needs and advocating when/where appropriate
	2. **Manage challenges – Ability to**
		1. demonstrate flexibility in adjusting the learning path according to the mentee's needs, time constraints, resources or other issues
		2. use appropriate communication skills and meet adequate decisions to resolve conflicts and minimize their impact on the mentoring program and relationship
		3. identify, analyse the and manage crisis situations, use adequate communication in case of conflict
		4. manage ethical issues and protect the Mentee’s sensitive personal data

**CHECK – Assessment**

* 1. **Assess the mentoring outcome – Ability to**
		1. apply structured & documented methods to assess at planned intervals
		2. the integration,
		3. the acquired professional competences,
		4. the achievement of the objectives and related action plans,
		5. the relationship between all involved parties
		6. include the company’s satisfaction and the relationship with the team in the assessment
		7. commit the WBL Mentee to self-assess
		8. manage to involve collaborators in the assessment
		9. share and agree the assessment results with the WBL Mentee
	2. **Self-assess the mentor – Ability to**
		1. self-assess the own WBL mentoring practices against recognised good practices
		2. self-assess the social and behavioural competences (role model, communication, teamwork, availability)
		3. identify own strengths and areas for improvement as a WBL Mentor
		4. document the WBL Mentee’s assessment of his WBL Mentor’s mentoring practices

**ACT – Improvement**

* 1. **Remediate the mentoring plan & outcome – Ability to**
		1. revise the objectives as necessary and justify the changes
		2. propose and mutually agree timely appropriate actions to remediate as necessary based on the assessment results
		3. involve collaborators in the remediation plans
		4. inform the school of the revised objectives and action plans
		5. communicate with the Academic mentor the strengths and the areas in which improvement is needed
		6. advise the WBL Mentee concerning performance both on the job and in school as well as his/her relationship with other employees
	2. **Improve the mentoring practices – Ability to**
		1. plan actions for improving the WBL Mentoring practices according to the assessment results
		2. identify and address personal VET needs related to WBL Mentoring
		3. demonstrate personal, social and learning to learn competence

**BE – Social, Managerial & Behavioural**

* 1. **Soft skills**
		1. Integrity
		2. Supporting attitude
		3. Responsibility
		4. Acceptance by peers
		5. Enthusiasm
		6. Positive attitude
		7. Empathy
		8. Team player
		9. Good communication skills
		10. Active listening
		11. Professionalism

**ANNEX B**

**(Normative)**

**EU WBL Mentor Code of Conduct**

With EMCC’s agreement, this Code has been adapted for WBL Mentors from the EMCC ([www.emccglobal.org](http://www.emccglobal.org)) code of conduct and is arranged into three sections covering general expectations of professional behaviour and conduct:

1. Working with Mentees
2. Professional Conduct
3. Excellent Practice
	1. **Working with Mentees**

**Context**

1.1 When professionally working with mentees in any capacity mentors will conduct themselves in accordance with this code, committed to delivering the level of service that may reasonably be expected from a practicising mentor.

**Contracting**

1.2 Before they start working with a mentee, mentors will make this Code available to their mentee, explain and make explicit their commitment to abide by this Code. Mentors will also make their mentees aware of their complaint procedures.

1.3 Before starting to work with a mentee, mentors will explain and strive to ensure that the mentee

know, and fully understand, the nature, terms and conditions of any mentoring contract, including financial, logistical and confidentiality arrangements.

1.4 Mentors will use their professional knowledge and experience to understand their mentees’

expectations and reach agreement on how they plan to meet them. Mentors will also try to take into

account the needs and expectations of other relevant parties.

1.5 Mentors will be open about the methods they use, and on request will be ready to supply the mentee with information about the processes involved.

1.6 Mentors will ensure that the duration of the contract is appropriate to achieve the mentee’s

goals and will actively work to promote the mentee’s independence and self-reliance.

1.7 Mentors will ensure that the setting in which any mentoring takes place offers optimal conditions for learning and reflection and therefore a higher likelihood of the achievement of the goals set in the contract.

1.8 Mentors should always put their mentee’s interests first.

**Integrity**

1.9 Mentors will accurately and honestly represent their relevant professional qualifications, experience, training, certifications and accreditations to mentees.

1.10 In communication with any party, mentors will accurately and honestly represent the value they provide as a mentor.

1.11 Mentors will ensure that no false or misleading claims are made, or implied, about their professional competence, qualifications or accreditation in any published, promotional material or otherwise. Mentors will attribute ownership of work, ideas and materials of others to the originator and not claim it as their own.

1.12 Mentors will act within applicable law and not in any way encourage, assist or collude with conduct which is dishonest, unlawful, unprofessional or discriminatory.

**Confidentiality**

1.13 When working with mentees, mentors will maintain the strictest level of confidentiality with all mentee’s information unless release of information is required by law.

1.14 Mentors will have a clear agreement with mentees about the conditions under which

confidentiality will not be maintained (e.g. illegal activity, danger to self or others) and gain agreement to

that limit of confidentiality, taking into consideration the case where the release of information is required by law.

1.15 Mentors will keep, store and dispose of appropriate and accurate records of their work with mentees, including electronic files and communications, in a manner that ensures confidentiality, security and privacy, and complies with all relevant laws and agreements that exist in their country regarding data protection and privacy.

1.16 If applicable, mentors will inform mentees that they are receiving supervision and identify that the mentee may be referred to anonymously in this context. The mentee should be assured that the supervision relationship is itself a confidential relationship.

1.17 If the mentee is a child or vulnerable adult, mentors will make arrangements with the mentee’s guardian to ensure an appropriate level of confidentiality in the best interests of the mentee, whilst also

complying with all relevant legislation.

**Inappropriate interactions**

1.18 Mentors are responsible for setting and maintaining clear, appropriate and culturally sensitive boundaries that govern all physical and virtual interactions with mentees.

1.19 Mentors will avoid any romantic or sexual relationship with current mentees. In addition, mentors

will be alert to the possibility of any potential sexual intimacy with the aforementioned parties and take

appropriate action to avoid the intimacy or cancel the engagement in order to provide a safe environment.

**Conflict of interest**

1.20 Mentors will not exploit a mentee or seek to gain any inappropriate financial or non-financial advantage from the relationship.

1.21 To avoid any conflict of interest, mentors will distinguish a professional relationship with a mentee from other forms of relationships.

1.22 Mentors will be aware of the potential for conflicts of interest of either a commercial or personal nature arising through the working relationship and address them quickly and effectively in order to ensure that there is no detriment to the mentee.

1.23 Mentors will consider the impact of any mentee relationships on other mentee relationships and discuss any potential conflict of interest with those who might be affected.

1.24 Mentors will disclose any conflict openly with the mentee and agree to withdraw from the relationship if a conflict arises which cannot be managed effectively.

**Terminating professional relationships and on-going responsibilities**

1.25 Mentors will respect a mentee's right to terminate an engagement at any point in the process, subject to the provisions of the mentoring service agreement.

1.26 Mentors will encourage the mentee to terminate the mentoring or engagement if it is believed that the mentee would be better served by another practising mentor or a different form of professional help.

1.27 Mentors understand that their professional responsibilities continue beyond the termination of the

professional relationship. These include:

• Maintenance of agreed confidentiality of all information relating to mentees

• Safe and secure maintenance of all related records and data that complies with all relevant laws and

agreements that exist in their country regarding data protection and privacy

• Avoidance of any exploitation of the former relationship, which could otherwise put into question the

professionalism or integrity of the mentor

• Provision of any follow-up that has been agreed to.

1.28 Mentors are required to have a provision for transfer of current mentees and dissemination of records in the event of the mentor’s incapacitation, or termination of practice.

* 1. **Professional Conduct**

**Maintaining the reputation of the profession**

2.1 Mentors will behave in a way that at all times reflects positively upon and enhances the reputation of an increasingly professionalised service.

2.2 Mentors will demonstrate respect for the variety of practising mentors and other individuals in the

profession and for the different approaches to mentoring.

**Recognising equality and diversity**

2.3 Mentors will abide by their respective bodies’ diversity statements and policies.

2.4 Mentors will avoid knowingly discriminating on any grounds and will seek to enhance their own awareness of possible areas of discrimination.

2.5 Mentors will be cognisant of the potential for unconscious bias and seek to ensure that they take a

respectful and inclusive approach, which embraces and explores individual difference.

2.6 Mentors will challenge in a supportive way any colleagues, employees, service providers, mentees or participants who are perceived to be using discriminatory behaviour.

2.7 Mentors will monitor their spoken, written and non-verbal communication for inadvertent discrimination.

2.8 Mentors will engage in developmental activities that are likely to increase their self- awareness in relation to equality and diversity.

**Breaches of professional conduct**

2.9 Mentors accept that any breach of the code that is upheld in a complaints procedure may result in

sanctions including loss of certification status. The certification bodies may disclose details of such breaches in the interest of mentee safety, upholding quality standards and maintaining the reputation of the profession.

**Legal and statutory obligations and duties**

2.10 Mentors are obliged to stay up to date and comply with all relevant statutory requirements in the countries in which their professional work takes place and work within any organisational policies and procedures in the context in which they are working.

2.11 Mentors will have the appropriate professional indemnity insurance to cover their coaching, mentoring and supervising work for the countries in which they operate.

* 1. **Excellent Practice**

**Ability to perform**

3.1 Mentors will have the qualifications, skills and experience appropriate to meet the needs of the mentee and will operate within the limits of their competence. Mentors should refer the mentee to a more experienced or suitably qualified practising member where appropriate.

3.2 Mentors will be fit and healthy enough to practice. If they are not or are unsure if they are able to practice safely for health reasons, they will seek professional guidance or support. Where necessary or appropriate, the mentor should manage the termination of their work with the mentee and refer the mentee to an alternative mentor.

**On-going supervision**

3.3 Mentors will engage in supervision with a suitably qualified supervisor or peer supervision group with a level of frequency that is appropriate to their mentoring practice, the requirements of their certification, or evidence engagement in reflective practice, ideally with peers and/or more experienced colleagues.

3.4 Mentors need to ensure that any other existing relationship with the supervisor does not interfere with the quality of the supervision provided.

3.5 Mentors will discuss any ethical dilemmas and potential, or actual, breaches of this Code with their

supervisor or peer supervision group for support and guidance.

**Continuing professional development**

3.6 Mentors will develop their level of mentoring competence by participating in relevant and appropriate training and/or continuing professional development (CPD).

3.7 Mentors are expected to make a contribution to the professional community that is appropriate to their level of expertise. Forms which this may take include informal peer support to fellow practising mentors, contributing to advancing the profession, research and writing etc.

3.8 Mentors will systematically evaluate the quality of their work through feedback from mentees, their supervisor and other relevant parties.

**ANNEX C**

**(Normative)**

**EU WBL Mentor Competence Exam**

**C.1 Assessment modalities**

Table C.1 specifies which assessment modalities are required to be submitted in which approximative timeframe by the candidates at the three different assessment stages (initial certification, surveillance, re-certification).

NOTE: the ability of the candidate to provide requested answers and documented evidence in a timely manner demonstrates a key mentor competence: the organisation and management of the business mentoring documents that shall be uploaded.

|  |  |  |  |
| --- | --- | --- | --- |
| **Modalities – imparted time** | **Initial certification** | **Surveillance****(yearly)** | **Recertification****(after 5 years)** |
| 1. Prerequisite – 0.5 h
 | x |  | x |
| 1. Upload of the 3 mentoring folders chosen by the examiner – 0.5 h
 | x |  |  |
| 1. Competences self-assessment & referrencing of related evidence – 1.5 h
 | x |  | x |
| 1. MCQ (20 questions, randomised) – 0.5 h
 | x |  | x |
| 1. Open questions (10, randomised) – 0.5 h
 | x |  | x |
| 1. Mentee’s satisfaction testimonial (3 per year)
 |  | x | x |

*Table C.1 –* Assessment modalities and allocated time

For initial certification, the prerequisite shall be assessed and validated prior allowing the candidate to access the exam (steps b) to e) table C.1).

All exam steps and modalities shall be performed on the scheme owner certification management platform. The WBL Mentor Exam Regulation (Annex D) is applicable.

**C.2 Assessment procedure**

Assessments shall be organised in compliance with the requirements of EU WBL Mentor 3024 and by the scheme owner’s Integrity Program.

For initial certification and recertification, the prerequisite shall be assessed and validated prior allowing the candidate to access the exam (steps b) to e) table C.1).

In the event of failure at any of the assessment stage, a repeated assessment will have to rely on the analysis of new evidence of the business mentoring experience, submitted by the applicant according to the assessment procedure described in C.1.

**C.3 Prerequisite assessment**

Prerequisites are used to verify the candidate's eligibility and are eliminatory in case of non- compliance.

Assessment of the prerequisites shall be performed either by the designated examiner or by a certification body’s staff member.

In any case, the examiner shall have access to the candidate’s prerequisites and their assessment prior the candidate’s acceptance to the examination procedure and all the way through the recertification procedure.

**C.4 Candidate’s self-assessment**

The candidate self-assessment (see Table C.1 c) shall:

1. address all 12 key competences (see Annex A),
2. be supported by documented evidence to be uploaded on the scheme owner certification management platform.

**C.5 Exam questions**

The scheme exam questions shall:

1. consist of the multiple choice and open questions drafted by the scheme experts,
2. contain correct or standard answers allowing a consistent marking,
3. be submitted to the scheme experts’ committee for comments and validation,
4. be maintained by the scheme owner on the scheme e-assessment platform, where the keys for marking the open questions are provided to the examiners,
5. be in accordance to a quality assurance tool (e.g. Eqavet).

**C.6 Competences assessment**

The competences shall be assessed by an assigned examiner registered according to EU WBL Mentor 3024.

The examiner shall assess the competences by cross validation of the candidate's self-assessment with the evidence provided and indicated by the candidate to justify the self-assessment (see C.4).

NOTE 1: the candidate’s self-assessment (see C.2) is indicative, only the evidence-based validation by the examiner is taken into account.

**C.7 Examples of evidence**

Examples of evidence are provided in association with the corresponding 12 key competences on the scheme e-assessment platform, where they are available for:

1. the candidates for preparing their application,
2. the examiners as guidance for assessing the evidence provided by the candidates.

The provided examples of evidence are continuously updated and completed by the scheme owner according to the examiners’ experience and fedbacks.

**C.8 Certification pass mark and coefficients**

The certification body shall apply the pass marks specified in table C.8 for granting or maintaining certification.

Failure to meet any single pass mark is eliminatory.

|  |  |
| --- | --- |
| **Modality** | **Pass mark** |
| **A. Initial certification**  |  |
| 1. Prerequisites
 | 100% |
| 1. MCQ
 | ≥ 60% |
| 1. Open questions
 | ≥ 60% |
| 1. Competence assessment
 | ≥ 60% |
| **B. Annual surveillance** |  |
| 1. Mentee satisfaction survey
 | ≥ 3 |
| **C. Recertification**  |  |
| 1. Prerequisites
 | 100% |
| 1. MCQ
 | ≥ 60% |
| 1. Open questions
 | ≥ 60% |
| 1. Mentee satisfaction survey
 | ≥ 3 |

*Table C.8 – Certification pass marks for EU WBL Mentor Competence Certification*

**Annex D**

(normative)

**WBL Mentor Competence Exam Regulation**

# Scope

The present regulation specifies the rules and procedures applicable to the competence exams performed within the framework of the WBL Mentor competence certification scheme.

# Roll-out of competence exams

## Concept of exams

The WBL Mentor competence exams are structured according to following principles and modalities:

1. Centralised development, applicable for all affiliated CBs and all candidates, irrespective of their localisation;
2. copies recorded on dematerialized forms centralized on an IT server managed by the scheme owner,
3. copies marked by a neutral examiner trained, qualified and calibrated by the scheme owner;
4. marking reproducibility assured through preliminary validation of questions and answers, based on multiple choice questionnaires and/or standard answers.

## Scope of exams

The exams cover the prerequisites and the assessment of the candidate's competences.

## Admission of candidates

All candidates fulfilling the eventual prerequisites shall admitted without to the competence exams.

## Exam location

The competence exams are passed in the rooms of affiliated CBs, which shall in particular:

1. be neutral and independent of the candidates;
2. provide individual computers for all candidates;
3. ensure the presence of a supervisor for the entire exam duration;
4. apply strict confidentiality to the exam content and results.

## Control of the candidate’s identity

The candidate is committed to attend the exam with a passport or identity card, of which he will give a copy to the supervisor.

## Exam roll-out

The candidate is not authorised to bring any paper, pen or communication device (e.g. mobile phone or computer) with him in the exam room.

The questions and case studies of the exam are provided on paper, as well as copies of standards, if necessary. All these documents shall be given back to the supervisor at the end of the exam.

The candidate responds to questions and case studies of the exam on electronic forms via the computer workstation available to him.

Access to any other web page as the exam form is prohibited. Any violation is punishable.

The browsing history is viewed and recorded by the supervisor at the end of the exam to trace the eventual use of webmail or from various sources. If the browsing history is deleted, the candidate is punishable.

## Exam supervision

A neutral supervisor is present throughout the duration of the examination in the room where the candidates complete their examination.

Candidates are under no circumstances allowed to leave the examination room during the entire duration of the exam.

The supervisor may at any time stop the candidate to view the browsing history of the candidate.

## Appointment and impartiality of the examiner

The certification body is responsible for the appointment and registration of examiners.

At the appointment of an examiner, the absence of any conflict of interest must be checked and recorded.

# Breaches and sanctions

## General

The scheme owner’s objective is to provide, at an advantageous quality/price rate, maximum flexibility to applicants, especially as regards the dates and places of examination.

In return, the candidates and their prospective employers agree that any attempt of cheating will be severely punished.

Certification bodies affiliated to the scheme owner for WBL Mentor competence certification take back the provisions of §§ 3.2 & 3.3 hereafter in the certification contract they sign with their clients.

## Breaches

The following cases are considered punishable breaches under this Regulation

1. use of a mailbox or any other attempt to communicate with the outside during the examination;
2. consultation of sites and web pages other than exam forms;
3. attempt to take notes or copies of examination questions.

## Penalties

In case of breach (see 3.2), the following penalties will be taken without appeal

1. cancellation of the examination, which will not be marked and will be considered as failed;
2. charging a participation of 5000 € to the development of an alternative exam.