



# Improving mentoring relationships: The role of the coordinator



**A workshop for the European Mentoring  
Summit 2018**



Topic 1: Making your mentoring training the best it can be

(1) Understand and accommodate different learning styles

People can learn in many different ways, and we all have our preferred methods for doing so.

Activity 1:

In the box below, list as many different ways you can think of in which people can learn:

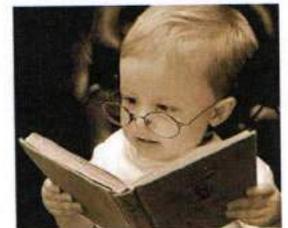
ideas: bring in different former mentors with different perspectives

Best Way of Learning is Teaching

- learning by doing
- testimonies/former mentors telling
- online/visual learning
- role plays
- brainstorming
- Studying / Reader reading

⊗ the more wanted the learning experience, the better  
⊗ the more active, the more impact

- From the list you've created, which are your preferred learning methods?



Activity 2 – Discussion:

- Why is it important to know about different learning styles when preparing and delivering training to your mentors?

to include everybody

- How might knowledge of your own learning style be important when you're delivering training?

- What are some of the things you can do to accommodate different learning styles when preparing your mentoring training?

What do



**Topic 1: Making your mentoring training the best it can be**

**(2) Achieve a balance of presentation and facilitation in delivery**

In your training, you plan, design, initiate and manage situations so that your mentors can learn. Delivering effective training requires a combination of **presentation** and **facilitation** skills.

It is necessary to give appropriate and relevant information to the mentors in the most effective way – this is where good **presentation skills** are essential.

However, it is also necessary to allow mentors to discuss topics with one another and to explore their own related experiences and ideas. As we have seen, learning needs to be an active process. People training in a group context also need to feel comfortable within the group. Achieving both of these aims depends on **facilitation skills**.



**Presentation skills: A good presenter should ...**

Activity 3	✓	✗	?
Cover as much information as they possibly can in the time available			
Become familiar with the room and space before presenting			
Plan and practice what they need to say until they can say everything comfortably and fluently without notes			
Assume their audience knows very little about the topic (or why would they be coming to a training session about it?)			
Feel completely calm and relaxed at all times			
Concentrate on the middle section of the presentation as that's where most information is given			
Concentrate on what they are actually saying and forget about non-verbal behaviour			
Use examples to support the points made			
Talk for longer than planned			
Ensure they have a really good set of slides to accompany the presentation			

- Is there anything else you think makes a verbal presentation really **good**?



### The role of facilitation in training

As we have said, facilitation is all about making sure people have a chance to participate, are engaged with the topic and are comfortable, including with one another.

Literally, facilitation is about **making things easier** – in this case for your mentors to learn.

In your mentor training, as well as presenting any information which needs to be presented, your role is to provide the right environment for mentors to participate in the learning process: to explore and express their own ideas, to reach conclusions and make decisions about the topic under discussion.

#### Activity 4: Discussion

- What kind of things could you do to try to ensure that mentors have a chance to contribute to the session?
- What kinds of things could you do to make sure that mentors feel comfortable?
- What kind of things could you do to make sure that mentors relate well to one another?
- How do you feel about presenting information verbally during a session? Is there anything that worries you about this?
- Do you have any concerns about facilitating group discussions during training?





Topic 2: Establishing appropriate boundaries



Activity 5: Why are boundaries important in a mentoring relationship . . .

... for mentees?	.... for mentors?	.... for the organisation?
<ul style="list-style-type: none"> <li>o <del>keeping</del> keeping a sustainable relationship</li> <li>o get expert help</li> <li>o child safety</li> </ul>	<ul style="list-style-type: none"> <li>o keeping satisfaction about relationship</li> </ul>	<ul style="list-style-type: none"> <li>o security</li> </ul>

Activity 6: Defining the appropriate boundaries for your project

Mentoring practice area	What's ok for your project?	What's not ok for your project?
Times of visits / outings		
Duration of visits / outings		
Location of visits / outings		
Activities carried out during visits / outings		
People present during visits / outings		
Exchange of gifts / money		
Physical contact		
Information exchanged		



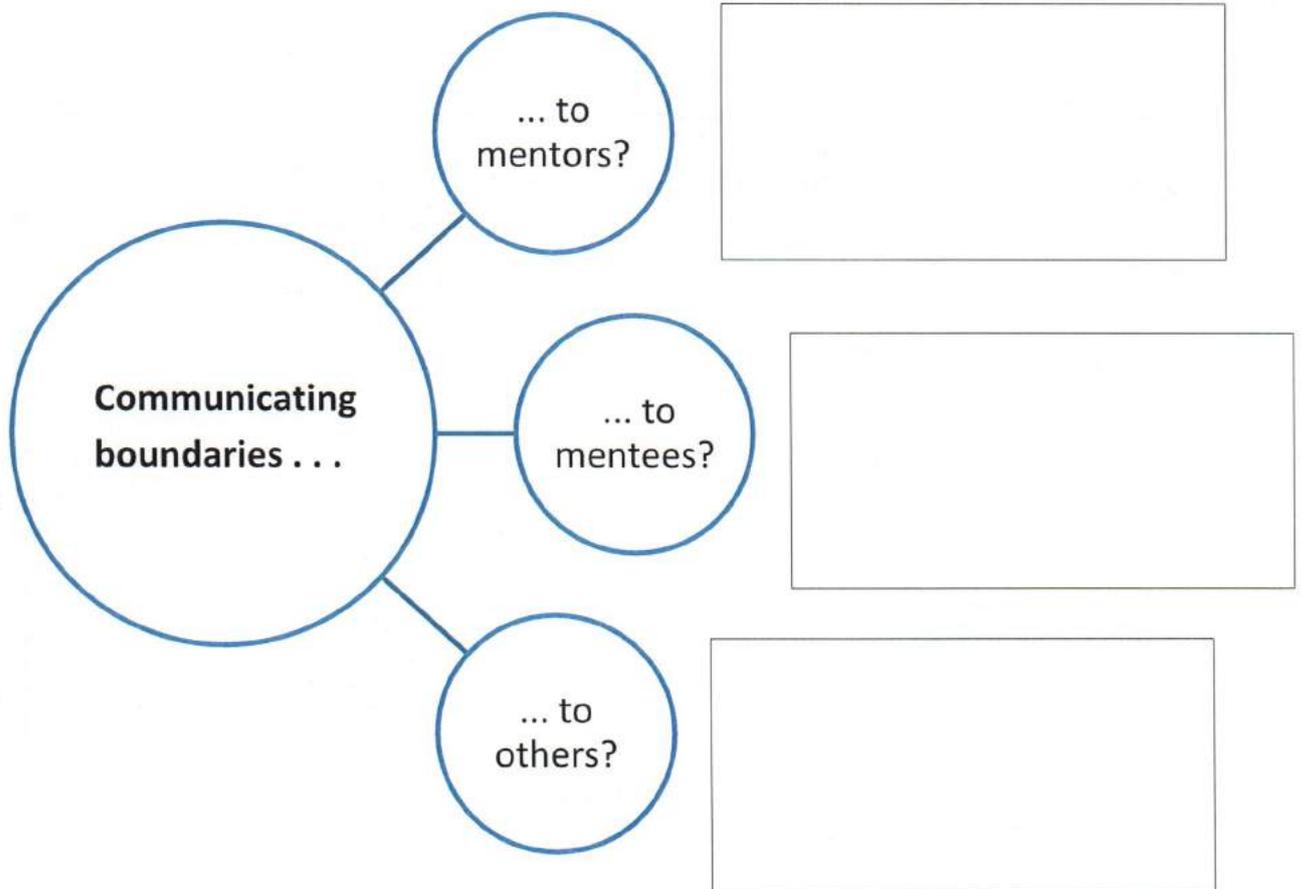


### Activity 7: Communicating Boundaries

No matter how carefully you've thought about the appropriate boundaries for your service, they won't be adhered to if people don't know what they are! Communicating what the boundaries of your mentoring relationships to the relevant people in the most effective way is an important part of the coordinator's job.



How can you ensure that everybody knows what is and isn't ok within your mentoring relationships?



#### Action point!

Think about the following question:

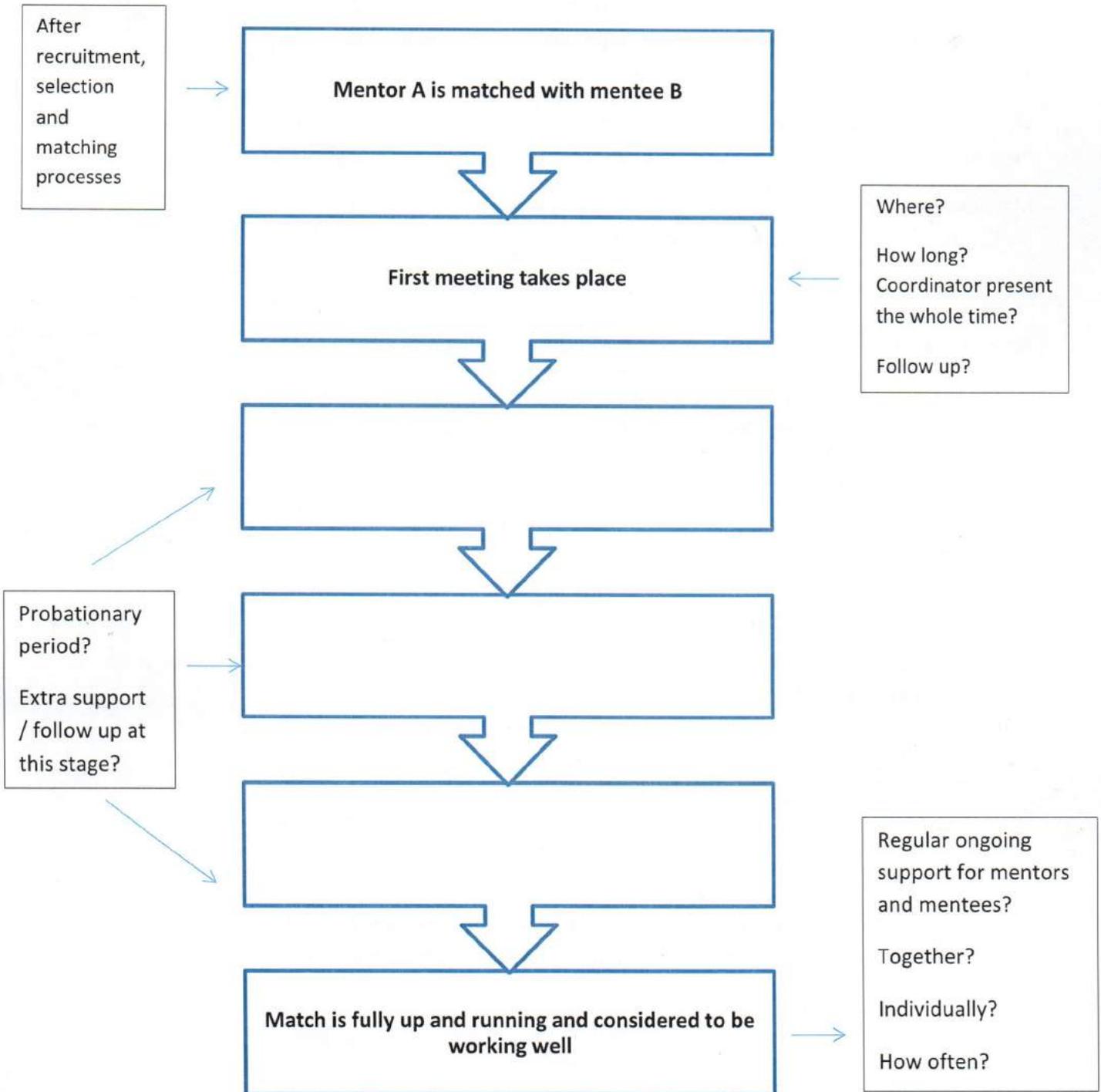
**What would be the appropriate steps to take if a mentor or mentee overstepped a boundary within your project?**







**Activity 9: What happens next?  
Supporting new matches and beyond**



**Action point!**

Do you think that anything needs to change about the way you currently carry out the matching process and provide support to mentors and mentees after they're matched?





Topic 4: Managing risk and keeping everyone safe

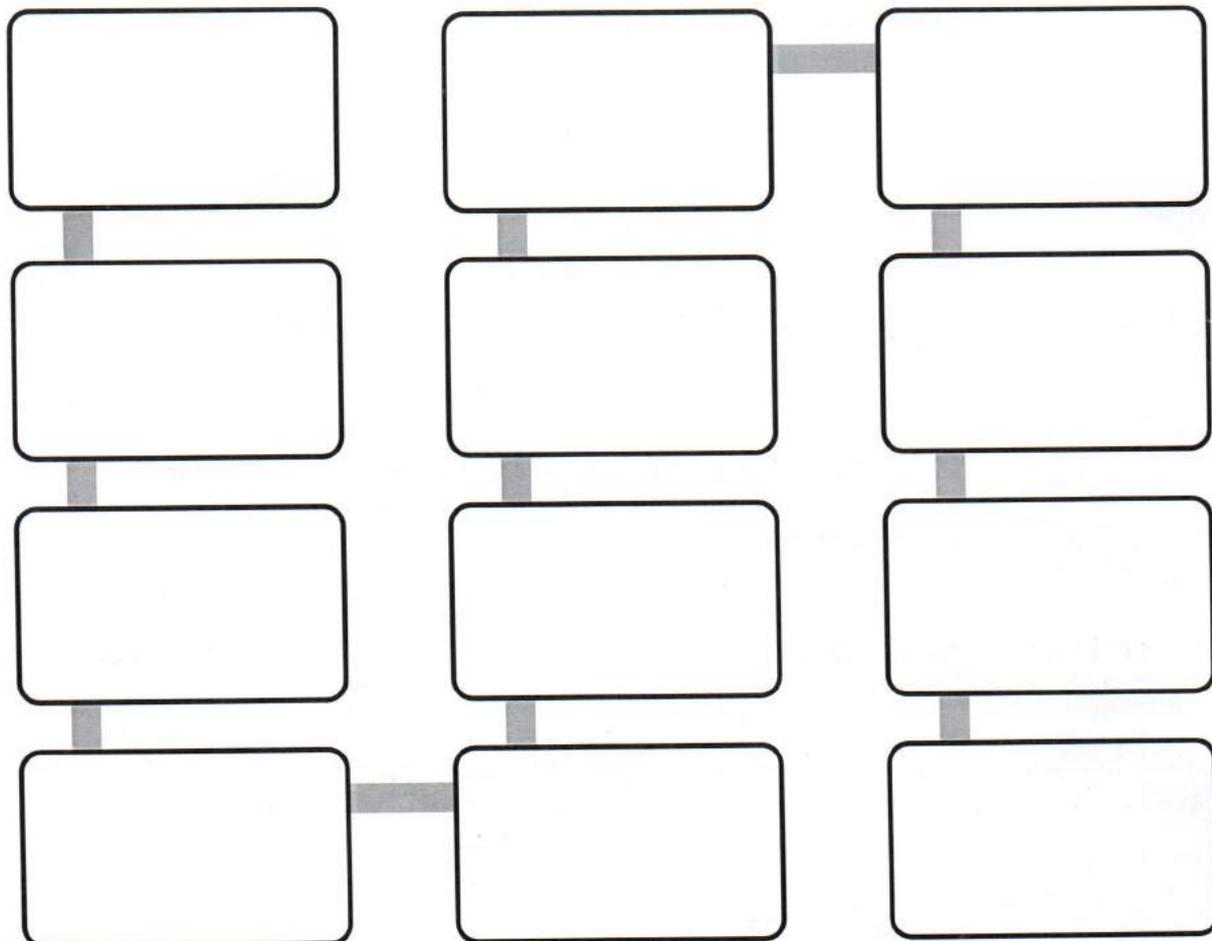
Activity 10: Discussion

- What are some of the things which can go wrong if risk is not appropriately managed within mentoring?



Activity 11: Processes which help to ensure safety

Mentoring organisations have many processes at their disposal which can and should help to ensure the safety of the service and everyone involved with it. We may not think of all of these processes as being part of our risk management, but nonetheless they are all factors which contribute to the safe running of our activities.



Risk Management  
↕  
Risk Assessment



### Activity 12: Maximising the safety aspect of existing procedures

To ensure that your routine processes and procedures are effective components of your risk management strategy, it is important to think about how to maximize the safety aspect of those processes and procedures.



Below is an example of how this could be done throughout the process of recruitment and selection of volunteers.

#### Process: Recruitment and selection of volunteers

Task	Made more effective by...
Recruitment	<ul style="list-style-type: none"><li>• Think about what kind of mentors you would like and use tailored materials that would appeal to that group.</li><li>• Think about the images you use on any promotional materials</li></ul>
Application forms	<ul style="list-style-type: none"><li>• Think carefully about the questions that you ask and the way that they are worded.</li><li>• Ask questions which will help you to understand the applicants' reasons for wanting to volunteer with your organisation.</li><li>• Allow it to be more than a registration form.</li></ul>
References	<ul style="list-style-type: none"><li>• Ask for more than one reference.</li><li>• Stipulate who the reference should be given by.</li><li>• Ask questions in the reference request that require a thought-out answer rather than a yes/no response.</li><li>• Read between the lines.</li><li>• Ask for follow-up information if you are not satisfied by the information you get from the original reply.</li></ul>
Interview	<ul style="list-style-type: none"><li>• Conduct interviews either in the office or a public place.</li><li>• Ask pertinent, searching questions.</li><li>• Listen to your instinct and try to identify any discomfort that you feel about any potential volunteer.</li><li>• If unsure ask someone else to meet the person.</li></ul>



**Over to you**

Have a look at the list of routine processes outlined in the document in this section entitled "Processes which help to ensure safety" and choose one (not recruitment and selection!) to break down and note ways of maximizing the safety aspect like the example provided above.



Process: \_\_\_\_\_

Task	Made more effective by...



## Assessing risk

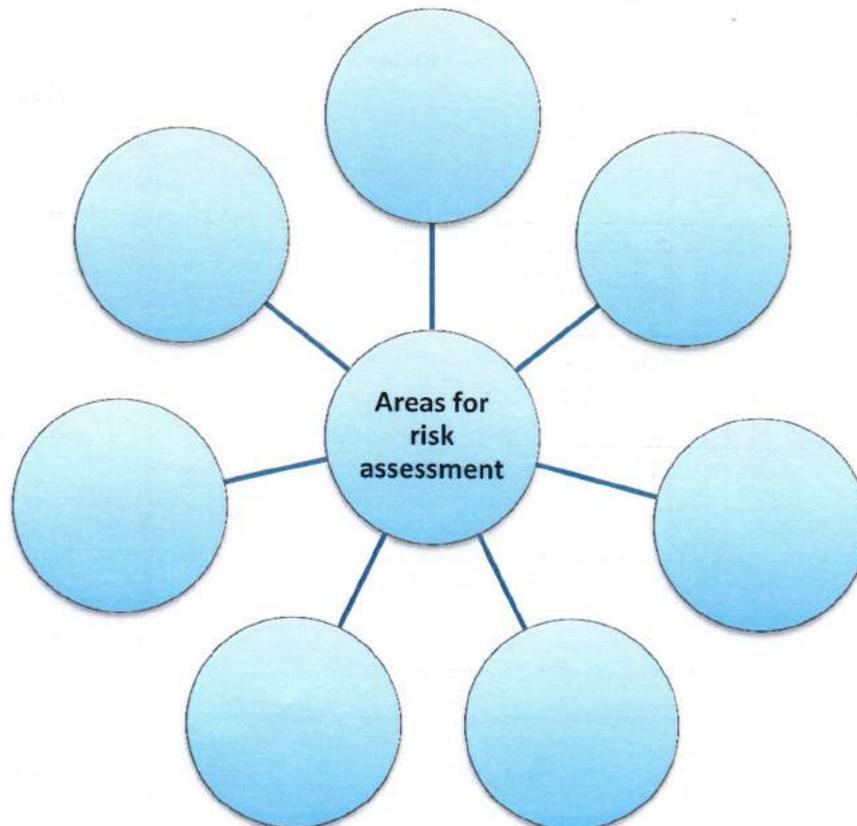
As part of a wider risk management strategy, all organisations are obliged / advised to carry out written risk assessments on their activities. Conducting a risk assessment of the mentoring relationship is usually the job of the coordinator.



### The 5-step model

1. Look for the **hazards** and define them
2. Define both the types and of **harm** which might be done and the **likelihood** of this happening (If you want, you can attach a numerical value to each of these which indicates their seriousness, or you can indicate this using 'low', 'medium', 'high' etc).
3. Evaluate the **risk factor** for each hazard and decide on precautions if required. The risk factor is reached by considering both the potential seriousness of the harm and the likelihood of it happening. Calculate the risk factor again after factoring in precautions to see whether it is now at an acceptable level.
4. Record significant findings
5. Review assessment as required

### Activity 13: What needs to be assessed?





## Activity 14: Risk assessment scenarios



### Scenario One: Activities in the community

The Link-up Project provides mentoring support for young people aged 10-16, who are having difficulty at school or at home. Mentors are matched 1:1 with the young people and typically the weekly contact is activity based e.g. trips to the cinema, swimming, 10 pin bowling etc.

- What would the coordinator need to consider when taking a young person on a trip to the cinema?
- What would the risk assessment of a trip to the swimming pool involve?
- The mentor has two horses and wants to take the mentee riding. Would you be happy for this to go ahead? Why?

### Scenario Two: The home visit

The Family Mentoring Project supports families in crisis with children under 10.

The Smith family's mentor reports that when she goes round to visit there are often people in the house, many of whom she doesn't know.

Sometimes they are sitting around drinking alcohol.

Mr Smith has a history of violence towards other family members and, although he no longer lives with the family, he is often there visiting and Mrs Smith says that she is hopeful of a reconciliation.

The Smiths' little boy seems to really enjoy it when the mentor goes round and he gets someone to pay him attention and play with him.

- How would you risk assess this situation?



### Activity 15: A risk management action plan

Is there anything you've thought about during this discussion of risk and safety that you need to take back and discuss with others in your organisation? Are there any changes you think you need to make to the way your organisation approaches risk management? Note your reflections in the table below.



- What, if anything, needs to be changed about the way safety is tackled in your project?
- Whom do you need to discuss today's information with?
- What three specific action points could you take forward from today?

○ Action Point 1	Timescale
○ Action Point 2	Timescale
○ Action Point 3	Timescale

### Final reflections

- Safety is everyone's responsibility whether in setting policy, providing info and training to others, or taking care whilst out providing mentoring support.
- Many of your existing work practices influence safety. Consider how they can be used to their full potential.
- Risk assessment is a simple tool to check for risks, take precautions and maintain safety standards. It is part of a wider risk management strategy.
- Don't make risk assessment a bureaucratic or a paper exercise just to cover yourselves. Make it meaningful for individual mentees and mentors by involving them in the process.
- Don't forget to ask your mentors to update you on any changes they see and update risk assessments in the light of information that your mentors observe when out with their mentees.
- You can never eliminate risk completely nor are you required to. Good risk management should allow you to ensure everyone's safety so far as is practicable, whilst still providing mentoring support that is fun, exciting and dynamic. **Taking care of risk allows you to feel safe about being adventurous.**

### The role of the facilitator

Literally, facilitation is about **making things easier** – in this case for the members of the groups you'll be working with.

The following definition is a useful summary of the core responsibilities of a group facilitator:

“... the facilitator's role is ... about opening things up for discussion in a stimulating way, getting ideas into the open and helping the group to listen to each other, further its knowledge and thus make informed decisions ...”

*Cameron, E. (2001), "Facilitation Made Easy", Kogan Page Business Books; 2nd edition*

When facilitating in a learning context, your role is not like that of a lecturer, where you are the all-knowing authority, solely responsible for providing a large amount of information. As a facilitator, your role is to provide the right environment for people to participate in the learning process: to explore and express their own ideas, to reach conclusions and make decisions about the topic under discussion.

### The importance of group cohesion

A crucial part of creating this participatory environment – and a key role of the facilitator - is to ensure that people feel comfortable within the group. The means making sure:

- (i) that people are committed to the aims of the group (and are therefore happy to be considered a part of it) and
- (ii) that the various members of the group relate well to one another.

- What kind of things could a facilitator do to try to ensure that group members are committed to the aims of the group??
  
  
  
  
  
  
  
  
  
  
- What kinds of things could a facilitator do to try to ensure appropriate connections between group members?

## Facilitation styles

There are three broad facilitation styles:

- **Directive** – you direct the learning process and take responsibility for determining the activities undertaken by the group. You may provide very specific questions to be discussed and may decide the way groupings are arranged, notes taken and feedback given.
- **Co-operative** – you collaborate with the group in devising the learning process. You confer with group members and negotiate aspects of the discussion / exercise together. Whilst you would share your views on how it could be done, these would become one of many to be considered.
- **Autonomous** – you give autonomy to the group and allow them to direct their own learning. This doesn't mean you abdicate responsibility completely but it is a subtle approach where you keep intervention and prompting to a minimum. You might ask them to decide whether they want to work in groups, pairs or on their own. You might give the group the task of deciding which aspects of a particular topic they'd like to discuss and how they'd like to do it.

All styles can be appropriate and useful in different situations and there may even be elements of all three approaches involved in a single discussion or exercise.

Generally speaking, the greater autonomy you can give any group in what and how they learn, the better it is for their learning. However, people often expect guidance from a facilitator, and will look to you to give it, particularly at the beginning.

Therefore it may be advisable to use a more directive style at the beginning of a session, and then gently ease the group towards greater autonomy through processes of gradually giving up power and control.

## The seven principles of learning

### **1. Utilise and stimulate the senses:**

Sight 75%; hearing 13%; touch 6%; taste 3%; smell 3%

### **2. Recognise and respect learning plateaus:**

Learning does not progress at the same rate always. There are spurts and plateaus. When a plateau is reached, sustained effort will be needed to create a new learning spurt. Trainers must help learners to become aware of this to help them maintain their confidence and motivation when experiencing plateaus.

### **3. Don't abuse the attention span:**

Without good attention, learning is likely to be partial and ineffective. When the instructor is doing all the talking, our attention tends to plummet after 10 minutes. The implications of this for training are very important – attention is maximised with short trainer-led periods interspersed with frequent opportunities for learner participation.

### **4. Encourage the effective use of memory:**

The acquisition of knowledge is a key component of effective learning. Memorising and understanding are both parts of this. In the process of memorising, we are trying to achieve a transfer of information from short term memory (STM) to long term memory (LTM). To achieve this it is essential that information is meaningful to the learner, is in manageable bits (around 7 chunks) and is sufficiently rehearsed (repeated a number of times until easily recalled).

### **5. Motivate students in their learning:**

Making learning interesting, meaningful and active – the real challenge for trainers.

### **6. Accommodate different learning styles:**

As individuals we have our own characteristic way of processing information, feeling and behaving in a learning situation and approaching a learning task. There is a need for training to provide many different ways in which learners can go about their learning.

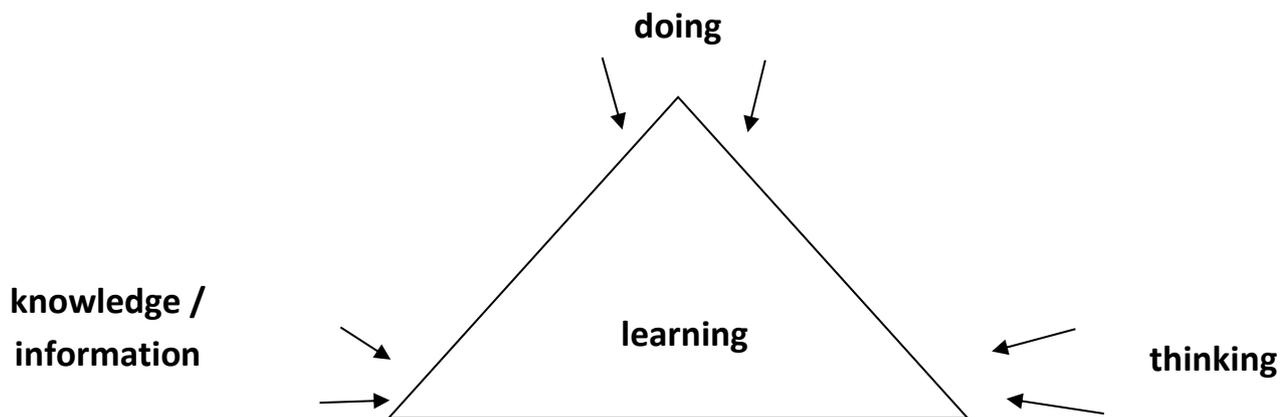
### **7. Give appropriate and timely feedback:**

Feedback is crucial: it highlights what needs to be learned, identifies the present state of learning, helps diagnose problems and find effective solutions and provides positive reinforcement for learning achievements

## The transfer of learning

If learning is to be understood, retained and of use in the future, then the three levels of learning (explained below) should form part of the learning experience.

### The three levels of learning



### Achieving the transfer of learning - tips for trainers

- Always relate anything you discuss to real situations that the befriender will face.
- Always stress the practical implications and the benefits of what you are covering.
- Use real life examples and stories to illustrate your points.
- Get participants to tell you, or each other, their own stories and how they can use what they have learned.
- Get participants to draw up action plans to implement the training and try to arrange for follow-up to make sure that actions plans are being implemented, perhaps as part of supervision.
- Where possible base training on real life situations.

## **Tips for accommodating learning styles**

Here are some more practical suggestions pertaining to each learning style:

### **Visual Learners:**

- use visual materials such as pictures, charts, maps, graphs, etc.
- have a clear view of your teachers when they are speaking so you can see their body language and facial expression
- use colour to highlight important points in text
- take notes or ask your teacher to provide handouts
- illustrate your ideas as a picture or brainstorming bubble before writing them down
- write a story and illustrate it
- use multi-media (e.g. computers, videos, and filmstrips)
- study in a quiet place away from verbal disturbances
- read illustrated books
- visualize information as a picture to aid memorization

### **Auditory Learners:**

- participate in class discussions/debates
- make speeches and presentations
- use a tape recorder during lectures instead of taking notes
- read text out aloud
- create musical jingles to aid memorization
- create mnemonics to aid memorization
- discuss your ideas verbally
- dictate to someone while they write down your thoughts
- use verbal analogies, and storytelling to demonstrate your point

### **Tactile/Kinesthetic Learners**

- take frequent study breaks
- move around to learn new things (e.g. read while on an exercise bike, mold a piece of clay to learn a new concept)
- work at a standing position
- chew gum while studying
- use bright colors to highlight reading material
- dress up your work space with posters
- if you wish, listen to music while you study
- skim through reading material to get a rough idea what it is about before settling down to read it in detail

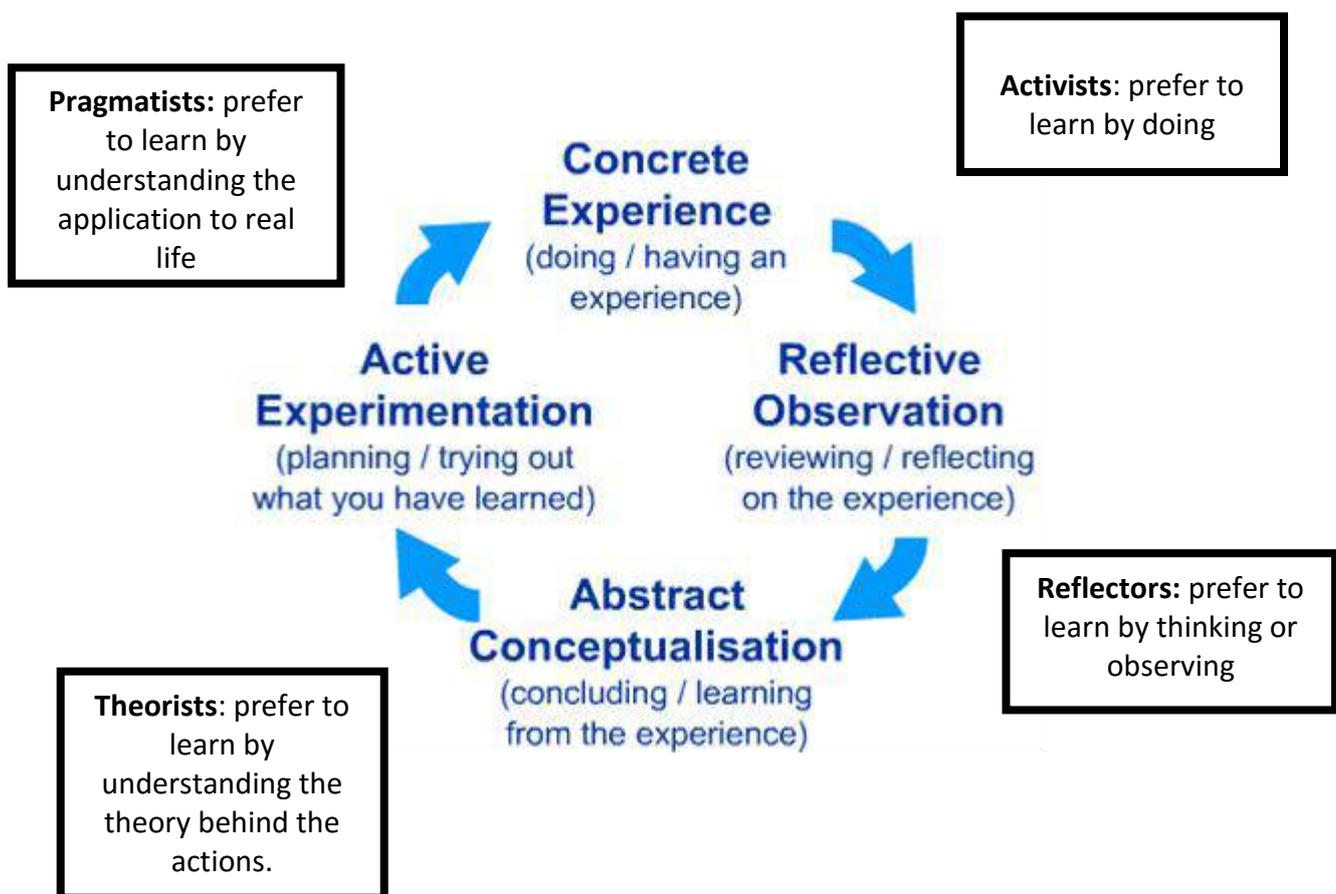


## Theories of learning styles – 4 theories

### 1. Kolb's experiential learning cycle

Kolb's theory of experiential learning<sup>1</sup> suggests that for everyone, there is a learning cycle where the learner goes through all the stages in the process in the act of learning. The cycle begins when we have an experience, which we then think about and reflect upon; then, whether we do so consciously or not, we draw conclusions from these reflections; these conclusions in turn inform the way we understand and behave in future situations, which leads us on to other, new experiences, and so on.

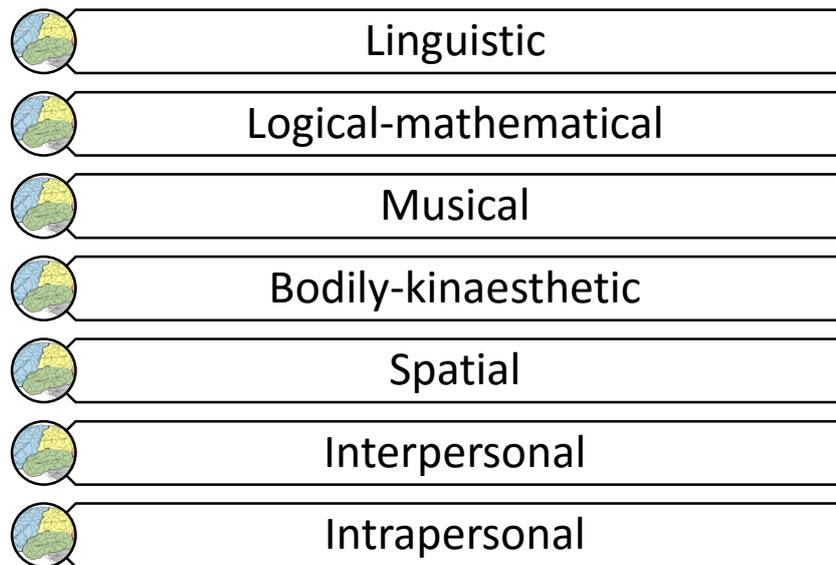
Although the learning process involves all parts of this cycle at some point or another, different people are more comfortable with different parts of the process. The diagram below identifies the different learning styles associated with these preferences:



<sup>1</sup> From the book "Experiential Learning: Experience as the Source of Learning and Development" by David A. Kolb, 1984.



## Gardner's Multiple Intelligences<sup>2</sup>



- **Linguistic intelligence** involves sensitivity to spoken and written language, the ability to learn languages, and the capacity to use language to accomplish certain goals. This intelligence includes the ability to effectively use language to express oneself rhetorically or poetically; and language as a means to remember information.
- **Logical-mathematical intelligence** consists of the capacity to analyse problems logically, carry out mathematical operations, and investigate issues scientifically. In Howard Gardner's words, it entails the ability to detect patterns, reason deductively and think logically.
- **Musical intelligence** involves skill in the performance, composition, and appreciation of musical patterns. It encompasses the capacity to recognise and compose musical pitches, tones, and rhythms. According to Howard Gardner, musical intelligence runs in an almost structural parallel to linguistic intelligence.
- **Bodily-kinesthetic intelligence** entails the potential of using one's whole body or parts of the body to solve problems. It is the ability to use mental abilities to coordinate bodily movements. Howard Gardner sees mental and physical activity as related.
- **Spatial intelligence** involves the potential to recognise and use the patterns of wide space and more confined areas.
- **Interpersonal intelligence** is concerned with the capacity to understand the intentions, motivations and desires of other people. It allows people to work effectively with others. Educators, salespeople, religious and political leaders and counsellors all need a well-developed interpersonal intelligence.
- **Intrapersonal intelligence** entails the capacity to understand oneself, to appreciate one's feelings, fears and motivations. In Howard Gardner's view it involves having an effective working model of ourselves, and to be able to use such information to regulate our lives.

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<sup>2</sup> From the book "Frames of Mind: The Theory of Multiple Intelligences" Howard Gardner, 1983

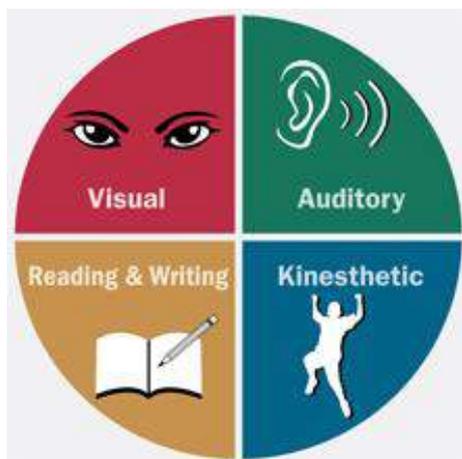


## Vital Skills in Befriending: Training for Trainers

### Fleming's VARK<sup>3</sup>

This was the first system to present a series of questions so learners could be tested to establish their learning styles. VARK stands for:-

- **Visual (V)**  
This preference includes the depiction of information in charts, graphs, flow charts, and all the symbolic arrows, circles, hierarchies and other devices that instructors use to represent what could have been presented in words. Visual learners also like to see their tutor's face and gestures.
- **Aural / Auditory (A)**  
This perceptual mode describes a preference for information that is "heard." Students with this modality report that they learn best from lectures, tutorials, tapes, group discussion, speaking, web chat, talking things through and so on.
- **Read/write (R)**  
This preference is for information displayed as words. Not surprisingly, many academics have a strong preference for this modality. This preference emphasises text-based input and output — reading and writing in all its forms.
- **Kinesthetic (K)**  
By definition, this modality refers to the "perceptual preference related to the use of experience and practice (simulated or real)." Although such an experience may invoke other modalities, the key is that the student is connected to reality, "either through experience, example, practice or simulation."

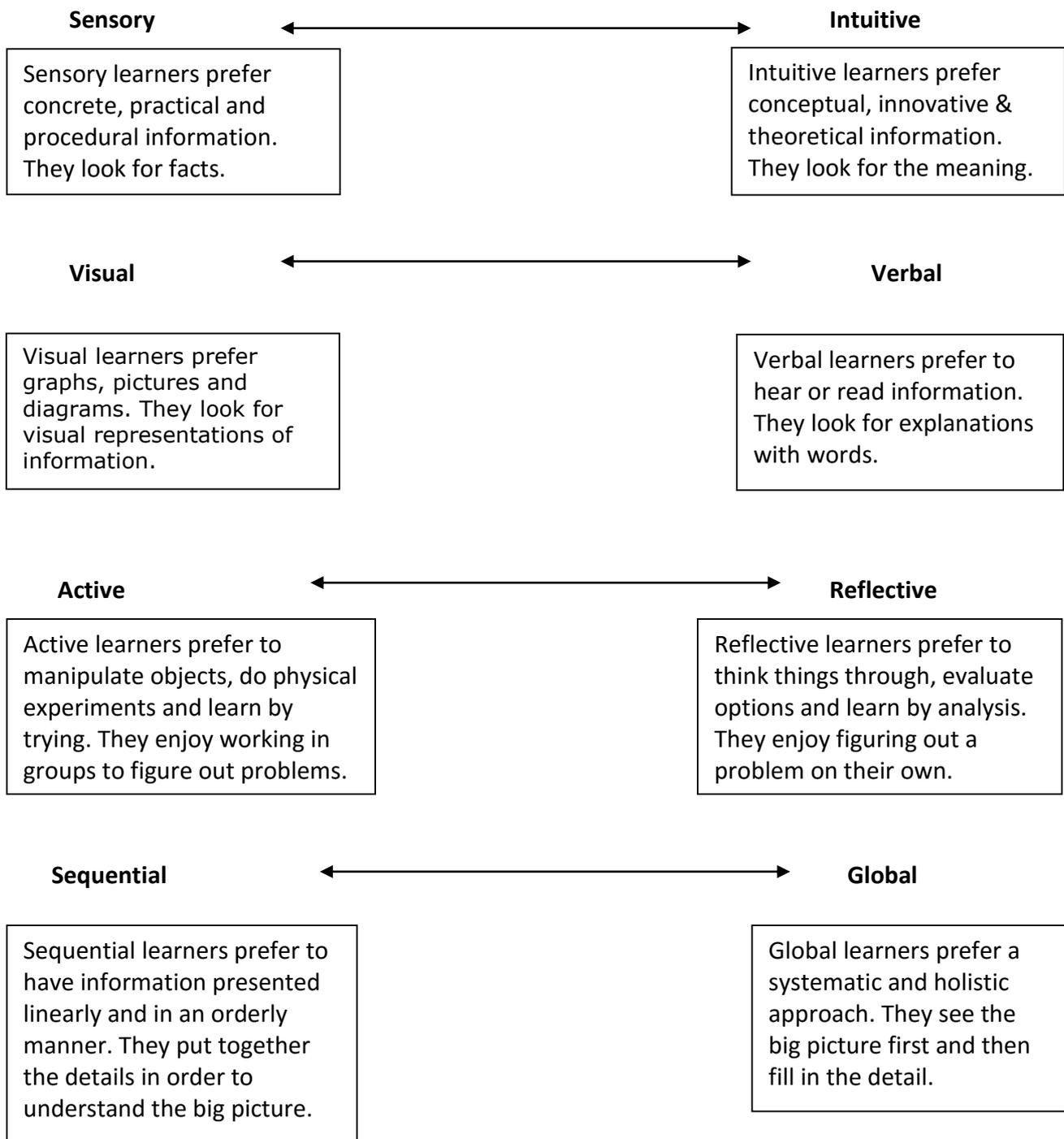


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<sup>3</sup> Developed 1987. Read more: [www.vark-learn.com](http://www.vark-learn.com)



Felder and Silverman's Learning Styles Index<sup>4</sup>



<sup>4</sup><http://www.mindtools.com/mnemlsty.html>



## Why boundaries important are within befriending: some reasons

For the befriender:

- So they know what to expect out of the service.
- So that they feel safe and secure.
- So that they know what is expected of them.
- So they know that this is an appropriate service for them.
- To learn social skills and norms that they can transfer to other relationships.
- So they don't become dependent on the befriender or service.
- So they aren't exploited.

For the befriender:

- So they know what is expected of them.
- So that they know how much of a commitment, both in terms of time and emotional input, is expected of them.
- To keep them safe, supervised and supported.
- So their willingness to help isn't taken advantage of.
- So they know the limits of the befriending relationship.
- So the befriender doesn't become overly reliant or dependent on them.

For the organisation:

- To ensure that they are running a service which is accountable and managed.
- So all befrienders and befrienderes get an equal service.
- To ensure that both befrienders and befrienderes are safe and supported.

## Delivering effective verbal presentations

### What do you think?

**A good presenter should ...** (Answer these questions before reading the pages that follow)

	Not at all	Rarely	Some- times	Often	Very often
Cover as many key points as they possibly can in the time available.					
Become familiar with the room and space before presenting					
Plan and practice their presentation until they can say everything comfortably and fluently without notes					
Assume their audience knows very little and then give them all the information they need					
Feel completely calm and relaxed at all times					
Make sure that organisers or other staff get all the equipment ready so that they can arrive right on time and start immediately					
Concentrate on the middle section of the presentation as that's where most information is given					
Concentrate on what they are actually saying and forget about non-verbal behaviour					
Use examples to support the points made					
Sometimes take a little longer than planned					

## Delivering effective verbal presentations

Delivering a successful presentation depends on four key elements:

1. Understanding your audience
2. Preparing your content
3. Delivering confidently
4. Controlling your environment

### Understanding your audience.

In training, the success of a presentation entirely depends on what your audience get out of it. The information could be delivered flawlessly but if it isn't what the participants want or need to hear then you've missed the mark. The following tips will help to ensure that doesn't happen:

- Find out in advance as much as you can about who the participants will be
- Using this information, think carefully about what they will want and expect out of your presentation:
  - What do they need to learn?
  - Are they likely to have any entrenched attitudes or particular interests that you'll need to respect?
  - What do they already know that you don't need to repeat?

### Preparing your content

To deliver an effective presentation, you not only need to deliver the information the audience wants, but you need to structure it in the right way. Below are some guidelines for structuring your content:

- **Identify a few key points:** to help the audience (and you!) retain the messages you're giving, group all the information into four or five key points. Verbal information which is categorised logically and consistently helps the listener to follow and makes it easier to remember both the main points and the details.
- **Don't include every detail** – Good presentations inspire the audience to learn more, and ask further questions to maximise their understanding of the issue.
- **Use an outline** – At the beginning, tell your audience what you intend to cover, and let them know what to expect. This helps build anticipation and interest from the start.
- **Start and end strongly** – Capture people's interest as soon as you begin, and leave them with a message they won't forget. It's tempting to put all of your effort into the main body of the presentation. However, if you don't get people's

attention at the start, they'll probably lose interest, and not really hear the rest anyway.

- **Use examples** – Where possible, use lots of examples to support your points. A dry lecture is often the least interesting and engaging form of presentation. Look for ways to liven things up by telling stories, talking about real-life examples, and using metaphors to engage your audience fully.

### **Delivering confidently**

Even the most appropriate and well-structured content can be ineffective if your presentation style is not appropriate. It's not the butterflies in the stomach that are the real problem – many people experience that before a presentation. These tips may help you overcome the major delivery problems:

- **Practice to build confidence** – Some people think that if you practice too much, your speech will sound rehearsed and less genuine. Don't necessarily memorise your presentation, but be so familiar with the content that you're able to speak fluently and comfortably, and adjust as necessary.
- **Be flexible** – This is easier to do if you're comfortable with the material. Don't attempt to present something you just learned the previous night. You want to know your material well enough to answer statements. And, if you don't know something, just admit it, and commit to finding the answer.
- **Welcome statements from the audience** – This is a sign that a presenter knows what he or she is talking about. It builds audience confidence, and people are much more likely to trust what you say, and respect your message.
- **Use slides and other visual aids** – These can help you deliver a confident presentation. The key point here is to learn how much visual information to give the audience, and yet not distract them from what you're saying.

### **Controlling your environment**

While much of the outside environment is beyond your control, there are still some things you can do to reduce potential risks to your presentation:

- **Practice in the presentation room** – This forces you to become familiar with the room and the equipment. It will not only build your confidence, but also help you identify sources of risk. Do you have trouble accessing your PowerPoint file? Does the microphone reach the places you want to walk? Can you move the podium? Are there stairs that might cause you to trip? These are the sorts of issues you may discover and resolve by doing one or two practice presentations.

- **Do your own setup** – Don't leave this to other people. Even though you probably want to focus on numerous other details, it's a good idea not to delegate too much of the preparation to others. You need the hands-on experience to make sure nothing disastrous happens at the real event.
- **Test your timing** – When you practise, you also improve your chances of keeping to time. You get a good idea how long each part of the presentation will actually take, and this helps you plan how much time you'll have for statements and other audience interactions.

**Remember:** Training participants want you to respect their time. If you end your presentation on time this can make a huge, positive impression on them. When speakers go over their allowed time, they may disrupt the whole schedule of the event and/or cause the audience unnecessary inconvenience. Be considerate, and stick to your agenda as closely as possible.

## Example of Boundaries Agreement

Boundaries in befriending are limits that which the organisation decides upon for all those involved in a befriending relationship. In practice, this usually means the befriender and the befriendeed.

Clear and consistent boundaries are important in befriending for the protection of both the befriender and the befriendeed and to promote a safe and comfortable environment within which the befriending relationship can develop. Boundaries can help to avoid confusion in the relationship for both parties, particularly around issues such as confidentiality, conduct and the role of the befriender.

Below is a list of initial boundaries set by the befriending service. All bendifenders and befriendeeds must agree to stick to these unless otherwise agreed with the Service Co-ordinator. Some boundaries may be different for certain matches, but any exceptions will always be negotiated between the befriender, befriendeed and the Service Co-ordinator. Failure to adhere to the agreed boundaries may result in the termination of the relationship.

### **Boundaries of the befriending service (examples)**

- Befriending is a one to one relationship. Your family or friends should not be involved in the befriending activity or outing
- Bendifenders and befriendeeds will adhere to scheduled arrangements and will notify the coordinator if a scheldued appointment cannot be kept
- No smoking will take place during befriending visits
- Bendifenders will only visit at pre-arranged times and for the agreed length of time
- There is confidentiality in the befriending relationship – volunteers and staff are expected to adhere to the Confidentiality Guidelines
- Visits to bendifenders' homes should not take place
- Phone numbers will not be exchanged
- Money will not be exchanged between people in the befriending relationship e.g. borrowing, lending
- Gifts (with a monetary value over £??) will not be exchanged in the befriending relationship
- People taking part in illegal activities will be excluded from the servie
- A befriending relationship is not a romantic or a sexual relationship
- Bendifenders will not be involved in intimate or personal care of befriendeeds, such as helping someone with the toilet

Any departures from these boundaries, or additional boundaries specific to particular matches, will be discussed and agreed with the coordinator at the first meeting.

If you ever encounter a situation where it is difficult to determine the boundaries, please contact the service coordinator for advice.

### **Agreement**

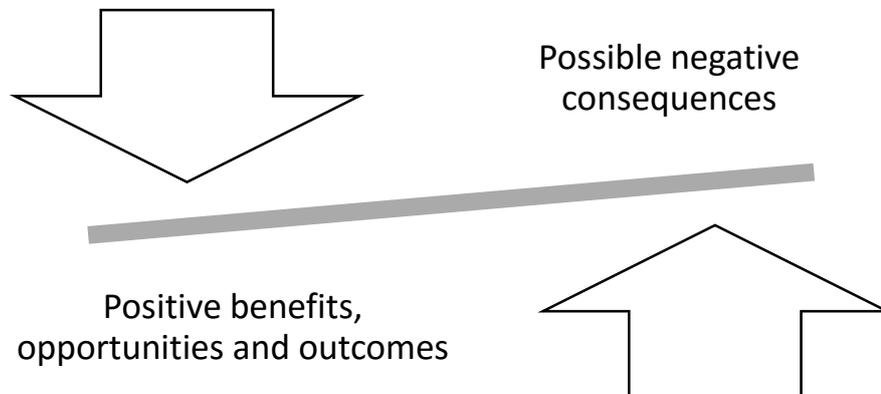
I agree to adhere to the boundaries set out above.

Signed \_\_\_\_\_



## Finding the right approach for your service

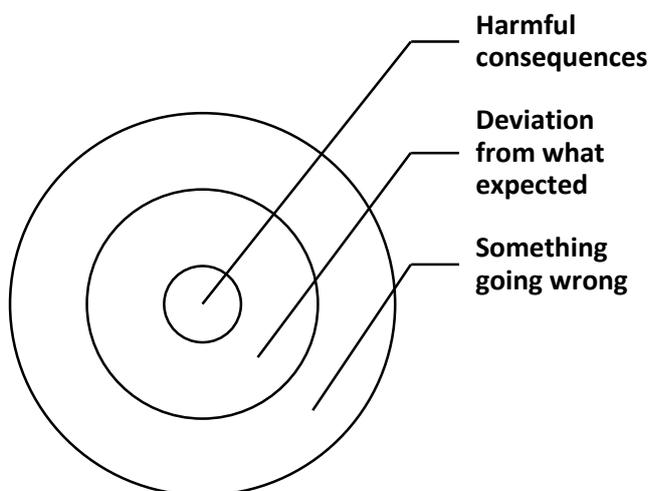
### Weighing it up



The charity commission defines risk as:

“The uncertainty surrounding events and their outcomes that may have a significant effect, either enhancing or inhibiting operational performance, achievement of aims and objectives, or meeting expectations of stakeholders”.

The focus of risk management in recent years has tended to be on the threat of something going wrong and the potentially damaging outcomes of this rather than on possible gains to be achieved. Risk assessment has focused almost exclusively on preventing this.



However ...assessment of risk should ideally involve evaluation of losses and gains. In other words if we stop doing this because of risks, what do we- and everyone who might have enjoyed the activity or gained from the service- stand to lose? But if we carry on doing it and make sure that it's done as safely as possible, everyone wins.

The risk of not doing something should always be in the equation. And those unanticipated benefits and happy spin-offs that sometimes result from befriending interventions are all part of the good side of risk.



### Reviewing and updating risk assessments – good practice tips

Befriending organisations have neither the staff nor the time to risk assess every meeting or trip every week. Venues which admit the public themselves have the responsibility to ensure that they are safe.

- At the beginning of the match put together a risk assessment document covering all the usual activities you might do. So for example if matches often go swimming and to the cinema, and ten pin bowling or the pool hall, make sure you have conducted a recent risk assessment of these activities.
- Think if there are any particular risks which might arise as a result of the combination of the activity and the client.
- For each activity list the risks, the steps you can take to minimise the risks and the positive effects which the activity may have.
- Sharing the liability. Meet with the befriender and carer (if appropriate) and run through the risk assessments. Ask if the befriender (or carer) has any concerns about any of the activities and either address these concerns or remove the activity from the list. Ask the befriender or carer to sign the list agreeing that they are happy to take part in these activities.
- Inform the befriender that they should let you know if they are going to take part in an activity not on the list, so that either they or you can check it out in advance and speak to the client about it.
- Ask the befriender and the befriender to let you know if they notice any risks which are not named on your list, when they take part in an activity.
- You can never completely eliminate risk, just effectively manage it.

### Remember ...

- You are providing a carefully selected befriender, who knows what is expected of them, who is doing a task within their capabilities and who has been given relevant, effective information and training.
- They have been thoughtfully matched with a befriender, who in turn has been carefully assessed.
- Together they are doing interesting, fun, well thought-out and planned activities in safe locations.
- The befriender is supported to deal with situations they encounter and encouraged to express concerns.
- Their work is supervised and reviewed and governed by policies and guidelines.
- Surely befriending projects are in a great position to support their befrienders to take and cope responsibly with every day risks and challenges that they have thought through and prepared for together.



## Good practice in assessing befriendees

- Amongst other types of important information (for example, related to the matching process), befriending organisations need to know things about their befriendees which might potentially pose a risk to the client themselves, the volunteer, the organisation or members of the public.

Examples of things they need to know about are any medical conditions, challenging behaviours, allergies.

- Organisations need to know how episodes of illness or anxiety or hostility etc. might be triggered and how to avoid these triggers if possible.
- It is also useful for organisations to know how these things may present. For example if a client was having a panic attack or a seizure, a voice-hearing experience or a peanut allergy how would their befriender know?
- Befrienders need to know how they can best react if an incident occurs.
- Coordinators should ask a range of people including referrers and carers and perhaps most importantly, especially where challenging behaviour is the issue, clients themselves. Coordinators should prepare a range of useful questions to help determine what their triggers are, what helps calm a situation down and how they would want to be treated if an incident occurred.

Does the Client Match?	<u>Volunteer</u>	MATCHING FORM	<u>Client</u>	Does the Volunteer Match?																																																																
	Joe Blogs	Name	Mary Smith																																																																	
	37	Own Age	58																																																																	
✓	no preference	Preferred Age of Match	30-50	✓																																																																
	male	Own Gender	female																																																																	
✓	no preference	Preferred Gender of Match	female	✗																																																																
✓	<table border="1"> <tr> <td></td> <td>M</td> <td>T</td> <td>W</td> <td>T</td> <td>F</td> <td>S</td> <td>S</td> </tr> <tr> <td>Morning</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Afternoon</td> <td></td> <td></td> <td></td> <td></td> <td>✓</td> <td></td> <td></td> </tr> <tr> <td>Evening</td> <td>✓</td> <td>✓</td> <td></td> <td>✓</td> <td></td> <td></td> <td></td> </tr> </table>		M	T	W	T	F	S	S	Morning								Afternoon					✓			Evening	✓	✓		✓				Times Available	<table border="1"> <tr> <td></td> <td>M</td> <td>T</td> <td>W</td> <td>T</td> <td>F</td> <td>S</td> <td>S</td> </tr> <tr> <td>Morning</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Afternoon</td> <td></td> <td>✓</td> <td>✓</td> <td>✓</td> <td>✓</td> <td>✓</td> <td>✓</td> </tr> <tr> <td>Evening</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table>		M	T	W	T	F	S	S	Morning								Afternoon		✓	✓	✓	✓	✓	✓	Evening								✓ Friday afternoon
	M	T	W	T	F	S	S																																																													
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Distance= 4 miles	west end	Home Area	east end	Distance= 4 miles																																																																
✓	5 miles	Distance Willing to Travel	1 mile with befriender (nervous going out alone)	✓																																																																
	no	Smokes	yes																																																																	
✓	yes	Will Accept Smoker	yes	✓																																																																
✓	no disability	Physical Ability	unable to walk far without resting, occasional wheelchair user	✓																																																																
✓	calm, practical, patient, positive outlook, experience of caring for elderly relative	Volunteer's Attributes v/ Clients Needs	wants to regain confidence about going out in public since had stroke has lost enthusiasm for previous hobbies	✓																																																																
✓ history & nature	listening to radio (Radio Scotland) football history Scottish countryside	Interests	reading (modern novels) genealogy Scottish history bird watching	✓ history & nature																																																																
cinema museums	visit museums / art galleries go for walks cinema would try most things once!	Activities Willing to Do	cinema museums / historical sites visit library	✓ cinema museums																																																																
?	sitcom (Ab Fab)	Sense of Humour	slapstick comedy Monty Python	?																																																																
✓ comedy	comedies, thrillers documentaries	Favourite Types of Film	historical dramas comedies	✓ comedy																																																																
✗	jazz soul	Favourite Kinds of Music	Scottish folk easy listening	✗																																																																
✓ novels	novels poetry	Favourite Reading Matter	modern novels history books	✓ novels																																																																
✓ France	Australia, USA, Hong Kong, Italy, France	Places Have Travelled	born in Sri Lanka used to have holidays in France	✓ France																																																																
Joe is a thoughtful person who will take time to draw Mary out of herself. His enthusiasm is infectious and could help to rekindle her interests and introduce her to new activities.		Hopes	Mary will hopefully become confident about going out with Joe because of his experience of taking his aunt out in a wheelchair. They have several wider interests in common and could enjoy exploring museums together.																																																																	
None.		Concerns	Mary said she would prefer a female befriender - she may accept a male, but this may make her more nervous																																																																	
Show Joe Mary's anonymised profile & find out if he's interested in being matched with her		Matching Decision and Next Steps	Ask Mary whether she would be willing to accept a male befriender.																																																																	



## Choice and information sharing: good practice guidance

### **Some choice is needed:**

Offering some choice provides people with more ownership of the relationship, and reduces the feeling that it is something 'out of their hands'. Allowing choice gives befriendees a chance to be positively involved in the match, and potentially reduces the likelihood of rejection.

### **Listen to preferences:**

Preferences expressed may indicate more of what befrienders and befriendees are expecting from the service or their involvement with it service e.g. looking for companionship, help to get out and about, a chance to use particular skills etc.

Caution about particular types of people or situation might be around fears. It can be useful to clarify what these fears are, how important they are and thus how far they should influence the decision on matching.

Where prejudicial comments are made when people are offered preferences i.e. when 'protected characteristics' come into the equation, coordinators need to decide whether or not there is 'objective justification' for accommodating this preference within their matching decision. If not, they risk contravening equalities legislation, which the organisation is legally bound to adhere to. Please see clarification of terminology below.

### **'Protected characteristics' are the following:**

Gender (and gender reassignment), age, ethnic background, sexual orientation, social class, religion, marital status, pregnancy / maternity

**An 'objective justification'** is the legal term for something which makes discrimination on the basis of protected characteristics ok in a certain case. In befriending, it means that, based on the circumstances and needs of individual befrienders or befriendees (NOT based on the assumptions of coordinators about what might or might not be suitable for all befrienders or befriendees) not discriminating would cause more harm than doing so. For example, if an older befriendees has lived in a cultural milieu in which mixing with people of the opposite gender is not usual and is not something the befriendees feels comfortable with, then honouring a preference for a befriender of a certain gender would be honoured, as the alternative might mean they wouldn't be matched at all.

### **The need for honesty:**

It is important to be realistic when befriendees are making choices, and let them know that being very specific about matching requirements could affect how long they have to wait for a match.

## RISK ASSESSMENT – GUIDANCE NOTES FOR CO-ORDINATORS - template

The Management of Health and Safety at Work regulations (1992) place a duty on employers to assess the risk to employees and anyone else who may be affected by the work activities being undertaken. As a result of this assessment, appropriate preventative and protective measures have to be taken to reduce the risk identified. In general, the same health and safety standards should be applied to volunteers as to employees exposed to the same risks.

The following form should be completed by the Co-ordinator during the initial interview period with the potential client, at the same time as the matching questionnaire. It should be reviewed at client feedback meetings, at least twice per year. The risk assessment process should be explained to volunteers by the co-ordinator during training and they should be encouraged to give feedback on any aspects of the risk assessment which they feel to have changed during their time with a any particular client. They would not be expected to carry out the risk assessment formally or to fill in the form, but they should certainly keep the co-ordinator updated. The risk assessment form (overleaf) follows the 5-point model, as recommended by the Health and Safety Executive in its 2006 guide.

### Explanation of Terminology

**“Hazard”**: Anything that could cause harm (e.g. chemicals or other dangerous substances, electricity, breathlessness, an aggressive dog, a worn stair carpet)

**“Risk”**: The chance, big or small, of harm being done

**“Assessment”**: Evaluation of the chance, big or small, of harm actually being done. On the form, this is represented by a numerical value between 1 and 5, 1 being the smallest chance and 5 being the biggest.

**“Precautions”**: Measures which can be taken to avoid or control the hazards

**“Remaining Risk”**: If the hazard cannot be eliminated entirely, what harm could still be done after all possible controls are in place?

## TEMPLATE – RISK ASSESSMENT FORM

<u>Subject of Assessment</u>	<u>The Client</u>	<u>Route to Client's Home</u>	<u>Location of Client's Home</u>	<u>The Client's Home</u>
Hazards Identified				
Who could be harmed and how?				
(i) How likely is each hazard to cause harm? (1 – 5) (ii) Seriousness potential of harm (1 – 5) (iii) Risk factor (i) X (ii)				
Precautions recommended  Actions / by whom / when				
Remaining risk				

<u>Subject of Assessment</u>	<u>Proposed Activity One:</u>	<u>Proposed Activity Two:</u>	<u>Proposed Activity Three:</u>	<u>Proposed Activity Four:</u>
Hazards Identified				
Who could be harmed and how?				
(i) How likely is each hazard to cause harm? (1 – 5) (ii) Seriousness potential of harm (1 – 5) (iii) Risk factor (i) X (ii)				
Precautions recommended  Actions / by whom / when				
Remaining Risk				

Client's Name: \_\_\_\_\_ Date of Assessment: \_\_\_\_\_ Name of Co-ordinator: \_\_\_\_\_