AMBIENT ASSISTED LIVING, AAL

JOINT PROGRAMME

ICT-BASED SOLUTIONS FOR ADVANCEMENT OF OLDER PERSONS' INDEPENDENCE AND PARTICIPATION IN THE "SELF-SERVE SOCIETY"

D2.5 Mentoring Concept

Final Version

Project acronym:	**ProMe**
Project full title:	**ProMe – Professional Intergenerational Cooperation and Mentoring**
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Delivery date:	**31.12.2014**
Dissemination:	**Public**

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1. EXECUTIVE SUMMARY

1.1 Link with the objectives of the project

This document describes the concept and vision for Intergenerational Collaboration & Professional Support within the ProMe project. The objective is to describe the nature of professional cooperation and mentoring, specifically, the key conditions for successful collaborative relationships and processes.

The mentoring concept was the first 'step' into WP 2 (User Requirements and Iterative Evaluations) and delivers a tentative comparative framework for different types of intergenerational collaboration. The framework was used for designing the user requirement research and activities.

In this document we describe the key questions that need to be answered in order to understand what kind of intergenerational support we want to facilitate through the ProMe platform. Moreover, we provide answers to these questions. These answers will constitute the specifications and conditions (from a behavioural science standpoint) for the platform (including but not exclusively the technical aspects) and describes the central aspects that need to be addressed in order to create effective intergenerational collaboration and learning. The work is based on the author's experience (KH Leuven) with mentoring and coaching practices in a professional context, discussions and reflections with practitioners and/or academic researchers in the field and a profound literature review.

This document, a framework for intergenerational collaboration, is focusing on the 'behavioural sciences' insights related to intergenerational collaboration (narrowed down to three types of collaboration: mentoring, coaching & network learning).

It will be complemented by a second document, D2.2, (section 3.1) drawing on HCI research & focusing on the facilitating and hindering impact of 'technological mediation' for intergenerational collaboration. It answers the question how 'intergenerational collaboration' is affected, hindered, stimulated by the 'technological mediation' such as video-chat, text-chat, email, blog, forum, etc. and what are the conditions for that 'technological mediation' to actually support effective intergenerational cooperation.

Both documents will serve as input for the design of the 'user requirement research and activities' and will together with the observations and outcomes of that research, lead to a number of conclusions, recommendations & guidelines for 'translating' the intergenerational cooperation concept into an online platform to stimulate intergenerational cooperation in reality.

In parallel we will also translate a number of insights about effective mentoring, coaching, and network learning into 'job-aids' and 'tools' that support the users of the platform to set up and sustain an effective collaborative process and relationship. During the development and design process, the concept will be refined, completed, enriched, and further developed in collaboration with and using the input of our consortium partners.

1.2 State of the art

In this chapter we will briefly describe the three types of collaborative relationships we want to promote through the ProMe platform. It is important to clearly define them as possibly overlapping but differentiated constructs (e.g., coaching can take place in a community of practice). Defining the types of collaborative

relationships has as main objective to understand the underlying 'mechanisms' that contribute to the quality and effectiveness of those relationships. The platform's features and the number of supporting job-aids will 'facilitate' the different conditions necessary in the three distinct types of collaboration to create an effective collaboration.

For the future users of our network, clear and distinct descriptions of the three types of collaboration is important to make sure that people engage in that type of collaborative relationship that is best suited for their situation, needs, expectations, competencies, experiences, etc. In order to create sustainable collaborative relationships it will be important to help people make 'informed' choices about joining the platform and about the specific role they sign up for.

If ProMe wants to effectively 'connect' people in a lasting and effectively supportive relationship they need to develop a shared and transparent psychological contract they both commit to (volitionally). "The term psychological contract is used to describe a set of individual beliefs or set of assumptions about promises voluntarily given and accepted in the context of a voluntary exchange relationship between two or more parties" (Rousseau, 1995).

"Psychological contract theory suggests that we shift the focus from what one expects to gain from the relationship to what one feels he or she is obligated to provide in the relationship. (…) understanding these obligations might provide valuable insight into why some specific functions are provided and others are not, especially with regard to structural characteristics of the relationship, such as the level of formality." (Haggard & Turban, 2012)

In these collaborative relationships you have two (and for learning network multiple) psychological contracts: the psychological mentoring contract of a 'requesters of support' defined as the obligations they believe they owe their suppliers of support and that their supporters owe them. Similarly, psychological contracts for supporters are the obligations they believe they owe their 'protégés' and that their protégés owe them (Haggard & Turban 2012). For an effective collaborative relationship it is important that both psychological contracts are compatible and preferably transparent for both parties (so forming a shared contract).

But the lack of agreement on the mutual obligations doesn't mean there is no 'psychological contract'. An important point to remember is that psychological contracts are conceptualized as an individual's perceptions of mutual obligations, and that actual agreement on the contract terms is not a requirement for a psychological contract to exist (Rousseau, 1989). It is possible that an individual might form a psychological contract with someone they consider to be a supporter (or protégé) without the other party developing a (similar and compatible) psychological contract with them. In that case chances are that the collaborative relationship will not be effective and very difficult to start and/or to sustain (Haggard & Turban, 2012).

Associated with the promises each party makes to another are mutual obligations and expectations, and depending on each party's beliefs about these promises, a psychological contract is subject to variations in expectations about that contract, i.e., matches and mismatches (Kotter, 1973), which may affect the potential for each party's expectations being met. If beliefs and assumptions and their underlying promises are clear for all involved parties it is more likely the expectations will be met. **We assume that good 'information' about what people can expect, and what is expected of them, when they enter in one of the three collaborative relationships, will contribute to the quality and the sustainability of that collaborative relationship.**

Distinction? Based on what?

We identified a number of 'entry points' to look at the different types of collaboration and a number of behaviours (intervention types) within those collaborative relationships (e.g., questioning, offering feedback, advising, informing, instructing, challenging).

The most fundamental 'continuum' seems to be the **'directive versus non-directive'** (see Figure 1: Directive versus non-directive relationships (Lippitt and Lippitt, 1978) attitude of the supporter. That continuum answers the question: "Who is predominantly driving the relationship?" It is the 'push-pull' continuum, indicating the 'place' supported and supporter take in the relationship and whether the focus for the 'supporter' is on 'solving the problem/answering the question' or to enable and facilitate the supported to solve his own problem, take his own decisions and answer his own questions.
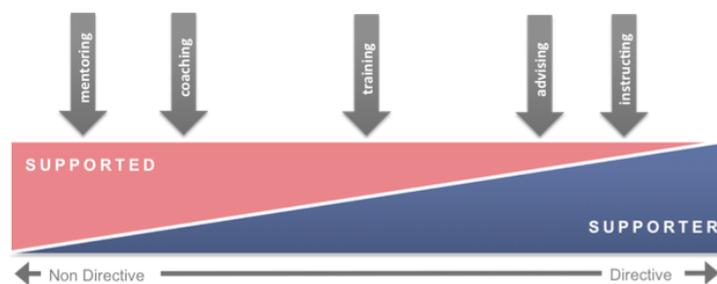
Figure 1: Directive versus non-directive relationships (Lippitt and Lippitt, 1978)

Of course, the same continuum is also valid 'within' the different collaborative relationships and, therefore, coaches and mentors will sometimes intervene in ways that are more or less directive, depending on the specific need of the 'supported' at a certain moment. The important element is not to shift 'ownership' from the supported to the supporter, because that would harm his autonomy for action in his professional context, which is contrary to the ideas of 'collaborative relationships' and which would be very counterproductive in the kind of external collaborative relationships we are talking about in the ProMe context. The coach or mentor is not present in the work situation of the coachee or mentee and, therefore, developing the capability for the coachee or mentee to act autonomously in his work context is quintessential.

The different behaviours that can be deployed by mentors and coaches are put on a continuum from 'directive/non directive' (see Robert Van Cott, 2013). To distinguish between types of collaborative relationships / behaviours we can also look at the following continua:

- Content/Expertise focus … versus … Process Focus: TEACHING –> ADVICE –> COMMUNITY OF PRACTICE -> COACHING –> MENTORING

- Balanced (interactive) versus Non-balanced (unidirectional): COMMUNITY OF PRACTICE -> MENTORING -> COACHING -> TEACHING –> ADVICE

We kept in this chapter the initial definitions of Teaching and Advising, but since we decided not to include those as 'distinct' collaborative relationships in the ProMe platform, we did not specify them further.

2.   TYPES OF RELATIONSHIPS

In this chapter, five types of relationship are considered as important for an online platform that aims at fostering collaborative relationships and are described in more detail: (1) Mentoring, (2) Coaching, (3) Virtual Community of Practice (Network Learning), (4) Teaching/Instructing, and (5) Advising.

2.1   Mentoring

Mentoring is a developmental relationship, involving intense accompanying of the mentee by a more experienced (mature) mentor[1] and focusing on both career development behaviours and personal growth and development, especially psychosocial support.

2.1.1   Key Features

- Is a One-on-One format (privileged relationship with one person)
- Open ended (no agreed duration)
- Longer term engagement
- It is an ongoing process were the needs, desired outcome, objectives and approach will be shaped (and is changing) as the mentoring relationship evolves in time.
- Is highly flexible and adaptable to the needs of the mentee. The mentor is supposed to be flexibly available in function of the possibly urgent need of the mentee (less planned and more on demand).
- Within a mentoring framework, short moments of coaching on specific professional assignments, of giving information, advice or teaching are possible as long as they do not alter the collaborative mentoring relationship.
- Stimulates reflection on the mentee's practice and is in that sense an element of experiential learning and creates 'self-awareness' (focusing on attitudes, relationships with others, etc…).
- Is relatively informal, focuses on attitudes and the interaction has an affective component.
- Takes a more broader and holistic view on the person (of the mentee) and is not focusing on one specific problem.
- The mentor is mainly using his relational, facilitating competencies and professional experience and secondarily the pure technical expertise. Maturity, calm, listening and empathy are key features.

2.1.2   Underlying psychological contract

The following expectations and obligations can be part of mentoring collaborative relationship

- Our mutual commitment is for a long time period
- The mentor will focus on and adapt the way he approaches the mentee considering the mentee's needs, personality and expectations.

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[1] Most commonly the word "mentor" means "wise advisor" and traces its origins in the Greek character Mentor, a friend of Odysseus and adviser of Telemachus in the "Odyssey".

- We don't have hidden agendas, express our mutual expectations and feelings, we practice frank and open communication and regular and constructive feedback.

- The mentee is in the drivers' seat. The mentee defines the issues that are addressed during mentoring activities.

- The content of what is discussed (and is possibly personal) is strictly confidential and will not leave the 'intimacy of the mentoring activities'.

- The mentee accepts responsibility and ownership for his issues and the way he actually deals with them (empowerment and ownership) and will not try to pass the monkey to the mentor.

- The mentor gets the mandate to challenge, question, …

- The mentor will take on a non-directive attitude, not imposing his viewpoints and not telling the mentee what to do. His focus is on helping the mentee to reflect upon processes and experiences and to become aware of his behavior and the impact he has on others, etc. (Deciding on what action to take is the responsibility of the mentee).

- It's a deliberate and conscious commitment for both parties (not pressured, out of their own initiative).

- Mentor and mentee respect each other's time and effort (and acknowledge that).

- Mentor en mentee agree to keep in mind the organization's interest, context, culture, technological and business choices etc. and develop where necessary 'stakeholder' relationships that support the developmental process the mentee is in. If the mentor at a certain point in time sees conflicts of interest or conflicting value models between him and the mentee's organization, he will discuss that with the mentee and organization and take appropriate concerted action (if necessary quit the collaboration).

2.2   Coaching

Coaching[2] is an experiential, individualized development process (Stern, 2004) meant to improve a person's skills, knowledge and job performance, leading to the achievement of organizational objectives. It targets high performance and improvement at work (CIPD, 2009), related to a specific assignment, problem or challenge. It is a collaborative, solution focused, result-orientated and systematic process (Grant 1999).

First, it focuses on **developing awareness** for the coachee of his behaviour, performance, knowledge (or the lack of) and the impact it has on his results and working relationships with others. Secondly, it focuses on helping the coachee to **develop alternative (innovative) courses of action** in order to cope with the issues at hand. It is in its essence non-directive, and aims at supporting people to develop autonomy, "helping the coachee learn rather than teaching them" (Whitmore 2003).

2.2.1   Key Features

- One-on-One format

- For the duration of the assignment, task, challenge that is the underlying reason for the coaching (a set duration and not open ended).

- Longer term engagement

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[2] Etymologically, the English term "coach" is derived from a medium of transport that traces its origins to the Hungarian word kocsi meaning "carriage" that was named after the village where it was first made.

- Scheduled, regular pattern of coaching sessions (it is planned in a structured experiential learning process)

- Meant to develop the coachees professional autonomy focusing on skills & competencies (capability to do something autonomously)

- Focused on professional issues, problems and assignments and consequently on improving contribution to organizational performance (with usually specific and immediate goals).

- The interventions of the coach are mainly: questioning, listening, challenging, feedback

2.2.2   Underlying psychological contract

The following expectations and obligations can be part of mentoring collaborative relationship

- The coachee is in the drivers' seat. The coachee defines the content of the coaching sessions

- Coaching time is coachee time

- The coach creates a process that is geared towards the specific needs and objectives of the coachee

- Coach and Coachee prepare the coaching sessions and respect each other's effort and time.

- The coach will avoid telling the coachee what to do and won't deliberately 'impose' his own way of working or dealing with the issues at hand (specifically important in those cases where the coach has been in the same or similar positions at a certain time)

- The coach creates awareness through questioning, challenging, exploring, probing, and gets the mandate from the coachee to do that.

- The coachee keeps the ownership for the problem and for his/her choices of action (doesn't pass the monkey).

- The coach treats everything he hears as confidential (unless the coachee explicitly agrees that the coach discusses it with others).

- The coachee is completely open and honest about what is really happening at work and can be assured that nothing goes back to his professional entourage

- We practice regular and constructive feedback (mutual) in order to constantly improve the quality of the coaching relationship.

In the ProMe project, we decided to make a distinction between coaching and mentoring. This distinction, though underpinned in literature, is somewhat arbitrary. You will find in (equally professional) literature different viewpoints and definitions of coaching and mentoring, and some authors even use both terms as perfectly interchangeable.

For the sake of clarity we want to acknowledge that the actual activities of a mentor and a coach can be very similar, but the scope of mentoring is more focusing on career and personal development, whereas with coaching the attention is directed on developing competencies to cope with specific professional assignments, to solve a specific problem or to cope with a professional challenge.

Coaching is often characterized as being similar to mentoring though less comprehensive. Mertz (2004) characterized coaching as including less (emotional) involvement than mentoring and as focusing primarily on professional development rather than on career advancement. Coaching may also focus more on a specific skill set rather than on holistic development. In looking at what the boundaries are between 'coaching' as compared to consulting and therapy, Carol Kauffman and Diane Coutu (2009) list the differences and overlaps as follows.
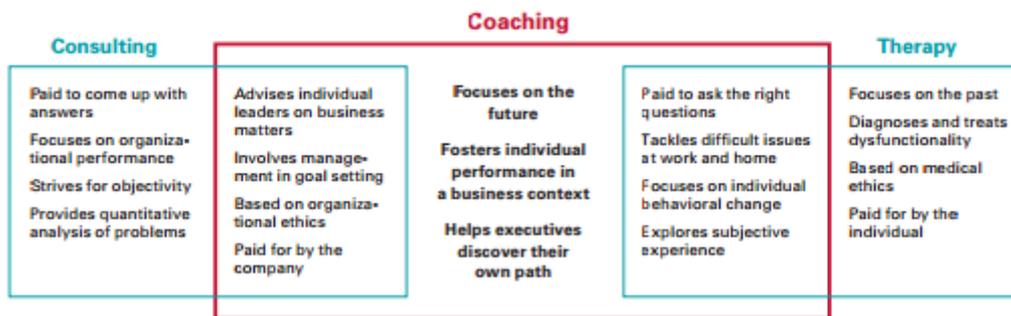
Figure 2. Coaching borrows from both consulting and therapy

2.3   Virtual Community of Practice (Network Learning)

Professional Network Learning is facilitated through a Community of Practice (CoP) giving the participants a platform to share (contribute and use) and develop knowledge and expertise in a defined professional area. A CoP is a group of people, who share a common concern, a set of problems, or interest in a topic (field of expertise), and who come together to fulfil both individual and group goals (Wenger, Mc Dermott and Snyder, 2002).

2.3.1   Key Features

- Many on Many (network dynamics)

- Facilitated by a community leader or facilitator (process not content role), who might or might not be the initiator of the learning community.

- Individual and collective (common) purpose (in line with each other)

- Members are at the same time users (beneficiaries) AND contributors (GATA)

- Modeled along three dimensions: Domain, Practice and Community (Wenger, 1998) (see Figure 3: Community of Practice (Wenger 1998)).

Figure 3: Community of Practice (Wenger 1998)

- The participants of a CoP create their own 'shared purpose' and reason of being (depends on the situation, and on choices made by participants) and what they actually do in the community (in line with the shared purpose)

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- The dynamic between the participants is intergenerational collaboration (specific dynamic between newcomers and old-timers in the CoP).

- Initiative can be taken by anybody, who then later on may become a participant or the CoP facilitator.

- It's about collaboration, and collective knowledge creation, not just knowledge transfer between individuals (they have to create something together)

2.3.2   Underlying psychological contract

- GATA (give a way, take away): we are all contributors and beneficiaries of the network (is a practical, but also an ethical dimension of not taking advantage of others)

- The commitment in a CoP is not 'in addition' to a 'normal job and objectives', but enables group members to improve their performance and their contribution to an organization (so it helps them reaching their).

- All group members are collectively responsible for the learning dynamic and collaborative processes (not the exclusive responsibility of the facilitator)

- All group members strive towards distributed leadership in the Community of Practice

- Mutual trust (in the willingness, the energy to contribute, the expertise, the usefulness of each other's experience, etc.)

- Confidentiality and respect for intellectual property

- Aims at producing 'added value' for individuals but also for the 'community' (society, for the field of expertise, for the organizations we belong to, etc.)

- Defined by a common purpose, concern or field of interest (likely to be content driver # therapy group)

- The facilitator commits for a longer period in time (to enable a dynamic over time) and the members participate over a reasonable period of time (otherwise it becomes a pigeon house)

It is a living, evolving body

Bringing people together doesn't necessary create a community of practice. A group of people may become gradually a community of practice in certain situations. One of the most surprising underlying evolutions is represented by a situation where the energy and directions often come from one or few members (often the initiator and/or facilitator) to a situation of thoroughly shared leadership.

Wenger (1998) describes the developmental phases of a community of practice as follows (see Figure 4):
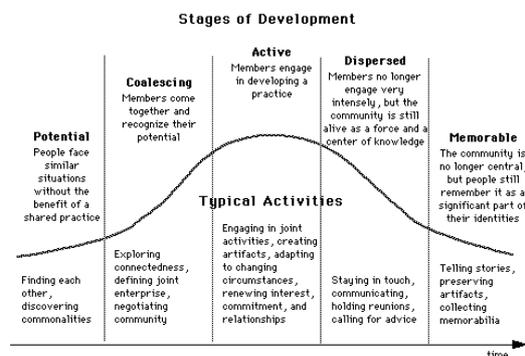
Figure 4: Development phases of a CoP (Wenger 1998)

What do members of a community of practice do?

Within a learning network a multitude of methods and activities can be applied to support the four main intended outcomes of a Community of Practice: Relate, Learn, Act, and build Knowledge. Activities in a CoP can include amongst others: intervision[3], coaching, working together in projects, brainstorming, sharing documents, asking and giving advice, organize learning activities and workshops, etc. Wenger structured activities of CoP in the following 6 areas and created a 'tools landscape' that goes with it (see Figure 5).
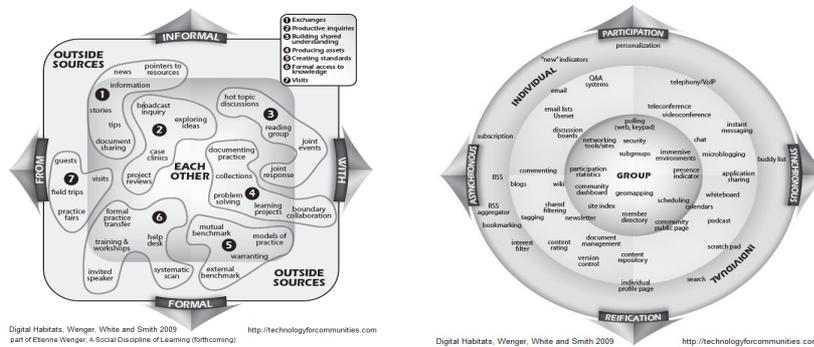
Figure 5: Digital Habitats (Wenger et al. 2009)

Generally a CoP is not only focusing on knowledge, helping each other, creating mutual learning opportunities (internal focus), but also on producing tools, processes, methodology, etc. that can be used in the organization (if the network part of an organization), in the respective organizations of the members or that can be useful for the society as such (external focus). The figure below (see Figure 6) is an attempt to describe the different elements of Knowledge sharing that can be practiced within a community of practice.

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[3] Intervision is another way of conversing with fellow scientist whom you do not know about work. Intervision requires some sort of guidance.

Different components of the community	What is being shared	The role of what is being shared	The result of knowledge sharing through communities of practice		
			Short-term	Medium-term	Long-term
Information component	Documentation of projects, articles and links	Improved access to information	Better informed dialogue	Improved approaches	Better development outcomes
	Re-use of assets		Better informed decision-making	Improved programmes	
Knowledge sharing component	Facilitating quick response for questions and answers	Enhances formal training		Improved projects	
	Access to pool of expert knowledge	Facilitates progress from 'novice' to 'expert'			
	Discussion of current issues	Mapping of knowledge			
Social component	Personal contacts	Increased satisfaction	Increased commitment		
	Increased social interaction	Sense of belonging	Increased engagement		
Organizational component	Increased synergy				
	Increased coordination				

Figure 6: Elements of Knowledge Sharing (Cummings et al. 2005)

Characteristics of successful networking

In order to preserve its vitality, enthusiasm and satisfaction of the members as well as the support of the organization, who counts on the community to deliver on expectation, Cummings & Van Zee (2005) listed a number of characteristics of successful networking, which are briefly described in the following.

Maintain pertinence

This relates to the adequacy and relevance of what the network does within a particular socio-political context. The conclusion of Pinzás and Ranaboldo (2003) is not to aim for a single shared meaning but rather a lively debate on the pertinence of a network is important. According to them, the more networks understand and effectively develop as spaces for innovation, experimentation and learning, and demonstrate their capability for advocacy, the more successful they are in continually renovating and revitalising themselves within an ever changing development context, and hence, ensure their pertinence.

Ensure added value

According to Pinzás and Ranaboldo (2003), it becomes clear that those networks that focus, either on a limited number of well-specified themes or a limited and well-defined sphere of social and political interaction, have generally achieved much more visible results, both internally and externally and have been able to obtain a higher degree of commitment from their membership.

Daring to share – atmosphere of openness

Although this sounds rather obvious, in practice this means that participants must have confidence in their work and 'dare to share' with others (Padron, 1991). A network must be characterized by an atmosphere of openness among participants, which allow them to admit mistakes and to learn from them (LEISA, 1992). Networks cannot flourish without this trust.

Skills, access and time/money

A presupposition of networking is that participants have the capacities to contribute: skills, access and time/money (see Plucknett 1990, Creech & Willard 2001, Nelson & Farrington 1994). If projects have little or none in-built space for reflection and learning, of course one cannot be expected to engage effectively in a learning network.

Commitment – motivated by self-interest

Participants must consider the priorities of the network as their own ones. They must be motivated by self-interest because networking is a potential added-value to their daily work. According to Padron (1991), the golden rule for success is letting a network start from its own resources. Initial self-reliance guarantees continuity, independent of whether funding in a later stadium is needed.

Shared problem or goal

Although discussion on pertinence leads to vital networks, it needs to be balanced by a common vision / shared goals among the members of a network. To generate useful interaction – in particular when individuals are working in different institutional and geographical settings – (an) issue(s) of common interest need to be identified (Nelson & Farrington 1994).

Clarity of focus and planning

To be effective, a network has to focus on a limited number of topics that need to be prioritised (Guijt et al. 2003). Otherwise participants of the network tend to put their own daily institutional priorities ahead of their network obligations.

Flexible internal management and participation

The success of a network depends more than anything else on the role of the network 'animator' (Padron, 1991). The role of such an animator is (a) to manage the flow of information across the network; (b) to keep participants engaged; (c) balance consultation with members with pushing forward the delivery on network plans; and (d) to monitor the financial health of the network (Creech and Willard 2001). Important are also participation in decision-making and a non-directive management style. After all: the participants work within a network, not for it.

Network orientation

An excessive attention to learning only from one's own experiences and debates may at certain points lead to isolation and blind network members with respect to relevant experiences elsewhere. Adequate information systems need to be developed to make sure that learning processes and advocacy activities within the network are well endowed with alternative views and options (Engel 2002).

The impact of 'virtual'?

There is significant experience with virtual networking and CoP supported by online tools. Virtual learning communities (VLC) are closely related to the idea of distributed communities of practice in many ways. For example, both emphasize a social constructivist epistemology and they may both have learning goals. However, virtual learning communities and distributed communities of practice also have considerable differences in membership, goals and social norms (Daniel, Schwier & Mc Calla, 2003).

An interesting distinction that is made in literature is that between 'virtual learning communities' and 'distributed communities of practice' (McCalla, 2000; Schwier, 2001). A VLC is a group of people, who gather in cyberspace with the intention of pursuing learning goals (Daniel, McCalla & Schwier, 2002), while a distributed community of practice refers to a group of geographically distributed individuals who are informally bound together by shared expertise and shared interests or work. Such individuals depend on information and

communication technologies to connect to each other. A key difference between distributed communities of practice and virtual learning communities is the nature of membership identity. While most individuals in virtual learning communities often hardly know each other, individuals in distributed communities of practice are typically well known to each other (see Figure 7).

Virtual Learning Communities

- Less stable membership
- Low degree of individual awareness
- More formalized and more focused learning goals
- More diverse language
- Low shared understanding
- Strong sense of identity
- Strict distribution of responsibilities
- Easily disbanded
- Low level of trust
- Life span determined by extent to which goals or requirements are satisfied
- Pre-planned enterprise and fixed goals
- Domain specific /interests

Distributed Communities of Practice

- Reasonably stable membership
- High degree of individual awareness
- Informal learning goals
- Common language
- High shared understanding
- Loose sense of identity
- No formal distribution of responsibilities
- Less easily disbanded
- Reasonable level of trust
- Life span determined by the value the community provides to its members
- A joint enterprise as understood and continually renegotiated by its members
- Shared practice/profession

Figure 7: Virtual Learning Communities vs. Distributed Communities of Practice (Daniel et al. 2003)

It seems to me that for future users of the ProMe platform the initial situation they will be in if they participate in Network Learning through the ProMe platform resembles most kf the characteristics of a VLC. The ambition however should be to evolve gradually towards the characteristics of a Distributed Community of Practice, as ProMe aims at adding value compared to all forums and communities that are currently existing on the internet.

In Figure 8 the possible technical features are listed in order to enable the primary activities of most communities of practice: Relate, Learn, Act & build Knowledge.

	Relationships	Learning	Action	Knowledge
Core Technical Features	• Distributed account management • Member networking profiles • Member directory with relationship-focused data fields • Subgroups that are defined by administrators or that allow members to self-join • Online meetings/chat • Online discussions • User-controlled delivery modes for notifications and information • Community activity reports	• Narrated PowerPoint presentations • E-learning tools • Assessments • Web conferencing and webcasts • Online meetings • Online discussions • Web-site links • Interactive multimedia • Variety of community member roles and responsibilities is supported	• Project management • Task management • Document collaboration • File version tracking • File check-in and check-out • Instant messaging • Web conferencing and online meetings • Online discussions • Individual and group calendaring • Subgroup working spaces	• Keyword and full-text searches (site-wide and by section) • Structured databases and database tools • Digital stories • Idea banks • Web conferencing • Online meetings • Online discussions • Announcements • Web-site links • Multiple modes for knowledge representation • Resources directly associated with interaction

Figure 8: Primary Activities of most Communities of Practice (Cambridge et al. 2005)

2.4   Teaching/Instruction

If we see teaching as something that is really different form the other forms of collaboration, and then we need to focus on the content and on the unidirectional idea of somebody, who knows and tells somebody who doesn't know how it works. Of course, also in regular (not on-line) instruction we see a clear evolution towards 'learner focused' didactics and more experiential activities (less focused on instruction by an instructor, but more focusing on facilitating the learning process).

In the literature around webinars you see the same tendency, where classical instruction is being replaced by more interactive teaching methods. Sometimes, if we consequently move in that direction the difference between teaching and some of the activities that are part of CoP become very thin and we evolve in the direction of collaborative work, brainstorming, intervision, etc.

The field of online instruction has evolved into a highly specialized and professional specialty within instructional design. Therefore we think that in the context of ProMe, where we would (per definition) work with content experts, but not trained online instructional designers, we would not be able to create qualitative and effective online instruction. The consortium therefore decided not to offer 'on-line teaching' as a type of collaborative support.

That does not prevent a coach, a mentor or a member of a community of practice to organize online- or offline moments of teaching and instruction. But that is then embedded in a larger collaborative working relationship and doesn't call for 'professional online instructional design skills'. In those cases the 'online' teaching will probably take place as a 'Skype-meeting', with verbal explanations by the 'coach, mentor or experienced peer'.

Since the function of 'consulting' in tackling professional problems or challenges is already covered in our definition of coaching, advising, needs to be defined as offering a specific information or advice, based on the technical/content expertise of the advisor, in order to answer to a very specific demand or request for information or advice. That means we see advising as an 'ad hoc' activity.

The consortium decided not to offer within the ProMe platform Advising as a distinct type of collaborative relationship because of the following reasons: It is 'ad hoc' activity and therefore it is difficult to create an attractive 'offer', i.e., difficult to define the expertise boundaries of that group of advisors within ProMe. Moreover, we notice that there are a multitude of specialized forums that already offer such a service. They are easily accessible and have a clear focus on what is the most straightforward method of helping the user to find the advice he is looking for

That of course doesn't mean that people, active on the ProMe platform cannot contact each other for ad hoc advice based on their specific expertise profile or based on their experience as mentor, coach or facilitator of Learning Networks. To contrary, we would encourage all users to share their awareness on mentoring, coaching and communities of practice with each other.

3. COMPARATIVE FRAMEWORK FOR 3 TYPES OF COLLABORATIVE RELATIONSHIPS

In this Framework we try to 'compare' the three selected collaborative relationships: Mentoring, Coaching & Network Learning (CoP). Please find a detailed overview on the comparative framework for these 3 types of relationships in Annex A. The objective of this framework is to illustrate the 'conditions & consequences' when it comes to thespecificity of each of those types of collaborative relationships. We **identify the context in which those collaborations occur and**

- what is necessary in order to make it actually work

- what would make people as 'requester' and 'supplier' to engage in such a collaborative relationship

- what does it take to sustain the collaborative relationship

- what makes the collaboration effective and does it create added value for both partners (learning, social cohesion, …)

In order to do that we created a number of standard questions (see Table 1).

- As a first step in the process of creating 'recommendations and guidelines' for the design and the development of the platform (see p. 2), we create in this text (preliminary) answers based on the information we presently have (mainly research and experience).

- In a second step, the answers to those questions will be refined and complemented by review of HCI research and literature (see D2.1)

- In a third step we will, based on these questions and in collaboration between KHLeuven & PLUS, develop and conduct a user requirement research and activities, that will enable us to further fill in the blanks and refine the answers to our standard questions.

- And finally that will allow us to develop a number of recommendations and guidelines for the design and the development of a platform that facilitates effective intergenerational collaboration through Mentoring, Coaching and Network Learning (and allowing interaction, learning, sharing information and advising between users of the ProMe platform).

FOCUS ON THE REQUESTER	1. The specific personal/professional needs /motives this collaborative relationship addresses & the expected added value (outcomes) of it for the requester
	2. What are triggers / hindrances for taking the initiative to seek 'help' and request this type of 'professional collaboration'
	3. Which are the necessary conditions for him/her to keep on investing in this collaborative relationship
	4. What does he/she need to do in order to contribute to an effective working relationship (what is expected of him, by the format and the collaborating partner)
	5. What kind of involvement of the professional organization the 'requester' is working in is required to create added value for requester and his/organization
	6. Examples of specific situations the 'requester' is in?

FOCUS ON THE SUPPORTER	7.	The specific personal needs / motives this collaborative relationship addresses & the expected added value (outcomes) of it for the supporter
	8.	What are the triggers / hindrances (barriers) for taking the initiative to offer help and engage in this type of 'professional collaboration' (pro-social behavior)
	9.	What are necessary conditions for him/her to keep on investing in this collaborative relationship
	10.	What does he/she need to do, in order to contribute to an effective working relationship (what is expected of him, by the format and the collaborating partner)
	11.	What are the specific competencies, skills, knowledge, experience, etc. needed to be an effective supportive partner in this professional relationship ?
	12.	Examples of specific situations the 'supporter' is in ?
SCENARIO	13.	Process steps to build up an effective collaborative relationship
	14.	Methodology and job-aids to support an effective collaborative process
	15.	What should the platform enable to do for both requester and supporter, before the start of and during the collaborative relationship (requirements)
SUMMARY	16.	Overall Success Factors for the collaborative relationship
	17.	Overall Pitfalls for the collaborative relationship

Table 1: Content of the Comparative Framework

4. TOOLKIT

The platform will deliver the features that enable and facilitate the actual 'connecting' and 'collaborating'. However, the methodologies of mentoring and coaching on the one hand and the multiple methodologies to be used possibly in a Community of Practice, on the other hand do call for a specific process and a number of 'process checks' in order for its efficiency, effectiveness and sustainability.

In order to help the partners in those three types of collaborative relationships to work from a common 'mental model' and structure their activities in such a way that they build progressively an effective and sustainable collaboration and learning process, we suggest to foresee a number of tools and job-aids within the three distinct contexts of mentoring, coaching and network learning.

Questions that need to be answered before we can 'design and develop' the necessary tools (or adapt existing one's) are:

- What are the 'process issues' we particularly want to support with a job-aid?

- What are the models that we choice (for instance: do we suggest to use the GROW model as a typical coaching process?)

- How do we create coherent 'toolkits', so that coaches, mentors and CoP leaders find easily the tools they need at the right moment in the process

- Do we want to make specific tools for 'requesters' and 'suppliers' or do we make the tools in such a way the same tool can be used by both partners

- How do we want to offer them to the users (for instance: as 'help' function in the system, a tools in .pdf to be downloaded from the platform and used in hardcopy)

- How do we create a type of search function that refer users to 'job-aids' when specific questions arise

- Since ProMe demonstrated the ambition to develop a pan-European platform, we should also consider the possibility of making these tools available in severalEuropean languages

As example we added 3 tools to this chapter, one for each type of collaborative relationship to illustrate how such tools could look like. Please find a detailed description of these tools in Annex B.

5. SUMMARY

Once this concept of intergenerational collaboration (translated into mentoring, coaching and network learning) will be complemented by the insights of HCI research, refined by our data gathering and analysis from the user requirement research, we will formulate a number of recommendations and guidelines for the platform design and development phase.

Based on what we know so far, we formulate already a few (preliminary) recommendations for what follows:

1. Every participant needs up front, so before he decides to actually engage in a collaborative relationship and before he decides what kind of collaborative relationship, should (through a questionnaire or otherwise) be forced to reflect on:

    - His personal strengths and weaknesses

    - What do you need in order to really commit yourself

    - What are your personal boundaries, availability, …

    - Expertise / Experience (content wise but also process wise / coaching and mentoring experience etc…)

2. Based on the 'assessment' (step 1) the system should provide some guidance and recommendations for people to do the right thing.

3. The demand for support needs to be sufficiently developed and of high quality in order to appeal 'supporters' to offer help. That demand (and the people who request help) need to be 'socially present' in order to attract motivated supporters (coaches or mentors)

4. There needs to be a function where people can 'relate' (even before they decided to do it) with people who are already doing it (supported and supporters)

5. There needs to be an 'activity' in which both partners 'contract' on their collaboration, create a shared purpose for their collaboration and exchange mutual expectations (customized for the five types of collaborative relationships)

6. For each of the collaborative relationships a job-aid needs to be available that helps both parties to understand what makes their collaboration successful and that enables them to put a number of necessary steps in their collaboration (process support)

7. Access to a flexible 'toolkit' with an easy 'orientation system' to find the right tool in function of the needs and the phase the collaboration is in.

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