

University of Strathclyde  
Department of Management Science

**Making sense of and valuing volunteering:  
on the edge between theoretical perspectives  
and managerial or evaluative practices.  
A multi-study, multi-method dissertation.**

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Degree of Doctor of Philosophy

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## Statement of conjoint work

Chapters 2, 3, 4, 5, and 6 are based on conjoint work with Dr. Elisa Ricciuti (ER), Dr. Graham Connelly (GC), Professor Alec Morton (AM), Dr. Francesca Calò (FC). I contributed 80% of the work to Chapter 2, 90% of the work to Chapter 3, 90% of the work to Chapter 4, 90% of the work to Chapter 5, 80% of the work to Chapter 6. My contributions to the conjoint work are summarized in Table 0-1. I am sole author of Chapters 1 and 7.

**Table 0-1 – Contributions to conjoint work**

<b>Chapter</b>	<b>Paper included</b>	<b>The PhD author contributed to</b>	<b>The co-authors contributed to</b>
<b>2</b>	The health and social impact of Blood Donors Associations: A Social Return on Investment (SROI) analysis	- Conceiving the paper - Data collection & analysis - Drafting the paper and the revision process for publication	- Conceiving the paper: ER - Drafting the paper and the revision process for publication: ER
<b>3</b>	Understanding the experiences of those who mentor in educational settings: a systematic review of the literature and conceptual framework	- Conceiving the paper - Data collection & analysis - Drafting the paper and the revision process for submission	- Conceiving the paper: GC, AM - Revising the paper: GC, AM
<b>4</b>	Examining holistically the experiences of mentors in school-based programs: a Logic Analysis	- Conceiving the paper - Data collection & analysis - Drafting the paper and the revision process for submission	- Conceiving the paper: GC, AM - Revising the paper: GC, AM

5	Putting the mentor experience into context: a mixed-method cross-cultural study	<ul style="list-style-type: none"> <li>- Conceiving the paper</li> <li>- Data collection &amp; analysis</li> <li>- Drafting the paper and the revision process for submission</li> </ul>	<ul style="list-style-type: none"> <li>- Conceiving the paper: GC, AM</li> <li>- Revising the paper: GC, AM</li> </ul>
6	Scaling social innovation: a qualitative cross-cultural comparative study of school-based mentoring interventions	<ul style="list-style-type: none"> <li>- Conceiving the paper</li> <li>- Data collection &amp; analysis</li> <li>- Drafting the paper and the revision process for submission</li> </ul>	<ul style="list-style-type: none"> <li>- Conceiving the paper: FC</li> <li>- Data analysis: FC</li> <li>- Drafting and revising the paper: FC</li> </ul>

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## **Abstract**

Nonprofit organizations (NPOs) contribute in unique ways to the sustainable development of societies. Thus, not surprisingly, the interest in identifying ways to make volunteer and community engagement in their activities wider and increasingly sustained is soaring. However, thus far, most evaluation research has primarily focused on the outcomes for program beneficiaries. As a result, our understanding of the drivers of other stakeholders' initial and continued commitment still remains relatively limited. The thesis encompasses multiple studies that expressly address this gap by applying a set of evaluation techniques that NPOs can use to acknowledge and escalate the involvement of community stakeholders, particularly the volunteers.

The first study illustrates an economic evaluation conducted to monetize the impacts accrued to the members of the Association of Voluntary Italian Blood Donors. It not only documents the value for money of the collective investments in the activities carried out by the NPO, but also locates courses of action suited to heighten its positive impacts. Studies from the second to the fifth deal with school-based mentoring and respectively include a systematic literature review, a qualitative enquiry, as well as mixed-method and qualitative cross-cultural comparative analyses. Fieldwork involved two existing mentoring programs, provided in Scotland and Italy by MCR Pathways and Società Umanitaria. Most studies explore the variety of outcomes pursued and derived by volunteers, while highlighting the factors that affect the most their intention to get involved and re-commit. The fifth enquiry rather investigates the paths to scale pursued by these organizations, discussing the conditions and actions that allowed or hampered growth, as well as the major risks incurred.

The thesis concludes, first, by outlining the key practical, conceptual and methodological implications of these studies. Then, a reflection as to the perils and challenges of conducting evaluation research with(in) NPOs is developed. Finally, it outlines some ways forward to assure that evaluation truly plays a role in helping NPOs involve more extensively and durably community stakeholders, maximize the value these stakeholders attain and address some of the bigger challenges facing societies.

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## List of abbreviations

ABC	Activity Based Costing
AVIS	Association of Voluntary Italian Blood Donors
BCA	Blood Collection Agency
BDA	Blood Donors Association
CBA	Cost Benefit Analysis
CBM	Community-Based Mentoring
CFA	Confirmatory Factor Analysis
CFI	Comparative Fit Index
CI	Confidence Interval
CMIN	Chi-square Minimum
df	Degree of Freedom
HE	Higher Education
MCAR	Missing Completely At Random
MCR	MCR Pathways
M&E	Monitoring & Evaluation
MR	Mentoring Relationship
NEET	Not in Education, Employment or Training
NPO	Nonprofit Organization
PTDE	Program Theory-Driven Evaluation
PYD	Positive Youth Development
RMSEA	Root Mean Square Error of Approximation
SBM	School-Based Mentoring
SIE	Social Impact Evaluation
SODA	Strategic Options Development and Analysis
SROI	Social Return on Investment
SU	Società Umanitaria
TLI	Tucker-Lewis index

ToC	Theory of Change
VFI	Volunteer Functions Inventory
WTP	Willingness To Pay
YP	Young Person

## Chapter 1: Introduction

This introductory chapter delineates the research area, theoretical and empirical context, as well as philosophical underpinnings on which this thesis is based. It primarily aims at emphasizing the practical and conceptual significance of the evaluation studies it encompasses. First, the academic rationale for conducting empirical evaluation research into how nonprofit organizations (NPOs) can escalate volunteer and community engagement is described. Second, the theoretical background and significance of evaluation into pro-social behaviors, as well as the research settings on which this thesis focuses, are illustrated. Next, the research aims, objectives and questions, as well as the methodological approaches taken are presented. Finally, after discussing the philosophical stance of the author, the introduction concludes providing an abstract for each subsequent chapter.

### 1.1 Rationale for the research

Across and beyond Europe, rising expectations are placed on the role that can be played to tackle a large number of urgent societal problems by the third or nonprofit sector, conceivable as *“the array of institutions and individual activities that occupy the largely uncharted social space beyond the market, the state, and the household”* (Salamon & Sokołowski, 2016, p. 1517). NPOs – also referred to as charitable, community-based or voluntary organizations – finds distinctive features in being: *“formally organised; non-profit distributing; constitutionally independent from the state; self-governing and benefiting from some form of voluntarism”* (Hardwick et al., 2015, p. 2). These organizations have gained a prominent role in the direct delivery of welfare services (Dickinson et al., 2012; Evers, 2005; Hardwick et al., 2015), reducing state expenses and giving rise to a system connoted by greater pluralism, citizens’ self-initiative and participation (Roy & Ziemek, 2000). Volunteering – intended as the act of *“giving one’s time freely and without financial reward to help other people or a cause”* (Grönlund et al., 2011, p. 7) – is a fundamental pillar and major driving force of this sector. According to Eurostat (2017), in recent years, about one fifth of the European population was involved in *formal* voluntary activities, which specifically denote those contributions of unpaid time made in favor of the activities carried out by established entities and



organizations (Lee & Brudney, 2012). Volunteerism contributes in unique ways to the sustainable development of societies, making them growingly equitable, socially inclusive and cohesive, as well as prosperous. Through voluntary participation, citizens not only variously enhance their individual wellbeing (see, for instance, Binder, 2015; Hansen et al., 2018; Jenkinson et al., 2013), but also actively partake in the production and redistribution of goods and services of public value. From this, greater collective welfare and stronger community ties ensue, coupled with a reduced burden on government spending (Roy & Ziemek, 2000; Valastro, 2012).

Given the increasingly important role played by volunteer-based NPOs in driving community development, it is not surprising that the public, political and academic interest in identifying ways to make stakeholder engagement in their ventures wider and increasingly sustained is soaring. This also calls into play the volunteer management practices that NPOs adopt, which should be designed and implemented in such a way to promote persistently positive attitudes and behaviors from the side of volunteers, be them actual or potential (Alfes et al., 2016). The latter aspect is, in fact, critical to the functioning and success of volunteer-based NPOs, with respect to both their capacity for service delivery and the potential for impact of their interventions (Cordery et al., 2013; Grönlund & Falk, 2019; Wisner et al., 2005).

Nevertheless, thus far, in many fields of NPOs' activity, the evaluand of most evaluative research consisted of assessing the outcomes of NPOs' interventions for targeted beneficiaries. Cordery et al. (2013) complained of a lack of organizational commitment to reporting of volunteer effort on the part of NPOs, which appear resistant to valuing both the inputs volunteers provide and the outputs and outcomes they help co-produce. Given this, it can be easily imagined how rare valuation activities that consider volunteers as fully-fledged program participants – rather than productive factors – are. As a consequence, our understanding of a number of other issues remains comparatively less developed. These include, for instance, what drives the initial and continued commitment of those volunteering within NPOs (i.e., sought-after/gained outcomes, enablers/hindrances of their experience) or, more generally, helps widen the engagement of community stakeholders.

Different reasons can account for the paucity of research on the subject. NPOs are more and more subject to reporting and accountability requirements, due to the increased need to demonstrate whether they are actually meeting their mission and the needs of relevant stakeholders. In a context of constrained resources for conducting evaluations, particular tensions can be faced by these organizations when it comes to prioritize and reconcile the multiple accountabilities they are faced with (Tenbensen et al., 2014). Indeed, the array of constituencies to which NPOs may be accountable is formidably wide, including their members, the population groups served and surrounding communities, the entities or individuals that provide the financial backing they may need to operate, regulatory agencies or partnering organizations, as well as their salaried or voluntary workforce. This results in competing accounting pulls to reconcile and the need to comply with accountability demands at multiple levels. Christensen & Ebrahim (2006) introduced the distinction between the responsibility to be accountable: i) “upwardly”, when allowing scrutiny by funders and donors of how resources have been used; ii) to “downward” stakeholders, when NPOs assess the extent to which the needs of final recipients have been met; and iii) to “lateral” stakeholders, including volunteers. The authors argue that too intense “upward” accountability demands may undermine the ability of NPOs to be accountable to lateral stakeholders or even to fulfill the organizational mission. Similarly, Benjamin & Campbell (2014) attribute the limitations of default evaluation models to the accountability requirements that funders currently require NPOs to meet.

Speculatively, another bias contributing to explain the relatively lesser attention being given by program evaluation to volunteers might lie in the belief that volunteer-centric studies can serve limited evaluative purposes. As outlined by Mark, Henry, and Julnes (1999), NPOs can engage in formal evaluation activities to: i) comply with accountability requirements, demonstrating that activities are carried out and resources used in the ways and for the objectives agreed; ii) assess the merit or worth of their programs, ascertaining whether they work well; iii) understand how programs or organizational operations can be improved; and iv) generate fresh knowledge about relevant phenomena occurring in the realm of social interventions, with expected implications for the wider population or other research areas (i.e.,

methodological advancements). Evaluation research concerned with the effectiveness of an intervention in improving beneficiaries' outcomes is, in principle, likely to accomplish all these functions. By contrast, investigations focused on the outcomes, recruitment and retention of volunteers may be misleadingly seen as primarily capable of addressing only program improvement and knowledge development needs, thereby being given a lower priority.

As identified by other scholars (Cordery et al., 2013; Manetti et al., 2015), the dominant causes of the valuing of volunteers (and of the investments made by NPOs on them) being so limited comprise not only the gratuity of the services volunteers provide, considering such evaluations too costly and capacity-stretching or the methodological challenges implied (including data's scarcity or unreliability), but even oppositions from the volunteers themselves. For instance, it was found that volunteers may react against certain reporting requirements (such as, recording volunteering hours) as perceiving this as an over-professionalization of their voluntary work. In my experience, not infrequently volunteers involved in my studies asked me about the provenience of the funds supporting research activities. I often wondered whether this was revealing of the appreciation of belonging to a NPO so forward-thinking to allocate resources to valuing volunteers or, conversely, of an implicit disapproval of "wasting" resources that could, otherwise, be invested in activities considered potentially more relevant to mission achievement.

In opposition to the drifts just described, it has been noted that, while compliance with "upward" and "downward" accountability mechanisms – primarily oriented to the measurement of final recipients' outcomes – are a high priority for NPOs, lateral mechanisms can crucially contribute to the achievement of those outcomes. In sum, improved accountability, at *all* levels, is key to enhancing mission achievement (Christensen & Ebrahim, 2006). Furthermore, formally acknowledging volunteers' efforts and needs can contribute to attracting and retaining prospective/actual volunteers, enhancing their motivation and commitment, or allow presenting, to external stakeholders, a more accurate and complete picture of the effective resource management carried out within a NPO (Cordery et al., 2013). Also, evidencing the broader and more indirect outcomes of social interventions, such as those to "lateral" stakeholders, would yield a fuller picture of NPOs' contributions as well. Given that

the interest of funding bodies in outcomes that unfold at both the individual- and community-level is rising, building the evidence-base in this respect may turn out to be key to providing a compelling case to fund NPOs and their programs (Meltzer & Saunders, 2020). In conclusion, the importance of conducting volunteer-centric evaluation is paramount for NPOs, to ensure both that their interventions are delivered as successfully as possible and that the engagement of community stakeholders in value-generating programs is properly acknowledged and escalated.

Leaving aside the underlying causes of the research gap that this thesis aims to fill, it is worth stressing its persistence within the streams of evaluation research concerned with the two fields of voluntary activity here considered. More specifically, the first study (Chapter 2) – conducted just before initiating my PhD – focuses on blood donation and illustrates an economic evaluation carried out to monetize the health and *social* impacts accrued to over one thousand members of the Association of Voluntary Italian Blood Donors (Avis). The following studies rather deal with school-based mentoring (SBM). Fieldwork and empirical analyses involved – either singularly or comparatively – two existing SBM programs, provided, in Scotland and Italy, by the NPOs MCR Pathways (MCR) and Società Umanitaria (SU). As shown in Chapter 2, a considerable amount of research has investigated whether blood donation actually improved donors' *health*, the motivating factors that spur their willingness to donate or the costs and benefits of specific components of the blood supply chain. However, no prior study had attempted to *holistically* assess the incremental value generated by Blood Donors Associations (BDAs) to the benefit of those who donate blood and/or volunteer within them and wider communities (Ricciuti & Bufali, 2019). Similarly, as the following chapters underscore, although youth mentoring rests on reciprocal and mutually beneficial relationships between volunteers and protégés, the stream of literature that focused on the determinants and fallouts of volunteer mentors' experiences is still in its infancy. Furthermore, this body of research is limited in that disproportionately focused on programs implemented in the USA or reliant on student mentors. Recognizing such a lacuna, the papers presented in this thesis attempt to refine our understanding of how NPOs can make volunteer and community engagement more extensive and sustained and which role evaluation research can play in this respect.

## **1.2 Research context**

### **1.2.1 Theoretical context**

Despite the increased role played by volunteer-based NPOs within societies, the interest of practitioners and academics in conducting program evaluations centered around the engagement of community stakeholders – first and foremost, volunteers – in their activities has risen at much slower pace. The studies presented in the current thesis expressly address the need for more research in this realm by discussing and applying a set of evaluation techniques that NPOs can use to devise strategies suited to escalate community and volunteer engagement.

As anticipated, the studies will focus on blood donation and SBM. There are several reasons why these two particular fields of voluntary activity represent an interesting context in which to consider research on volunteer management.

These two seemingly unlike helping behaviors mostly differ with respect to the anonymity of the recipient, such that the act of donating blood cannot be reciprocated, not even by means of a simple expression of gratitude (Titmuss, 2019c). However, it is worth pointing out that mentors usually commit to a potentially long-term mentoring relationship without prior knowledge of their mentees' identity or any guarantee to be rewarded in return anytime in the future.

Furthermore, in both fields, NPOs heavily rely on the scale and attributes of their pool of volunteers. Indeed, in similar ways, high standards are designed and applied to guide the selection of givers, to safeguard recipients against the potentially harmful consequences of a low-quality gift (Titmuss, 2019c). The constraints ruling volunteer recruitment make the difficulties pertaining to the shortages of volunteers in these two fields more easily understandable, yet more complex and delicate to manage.

Most importantly, both these acts of giving challenge economists to make sense of them. This endeavor entails finding an escape route from the essential logic irreconcilability between the spirit of genuine altruism that may be assumed to drive them and the principle of rationality – or even crude utilitarianism – that, conversely, should direct the choices and actions of each homo economicus.

### **1.2.1.1 Rationalizing volunteering**

This section outlines some of the most notable theoretical arguments advanced to explain *why* individuals are willing to donate. The purpose of this section is not only to shed light on the importance of studying this phenomenon and the roots of the investigative journey collectively initiated to make sense of it, but also to help readers position the following chapters within a quite intricate theoretical landscape.

As some have argued, giving (and volunteering) stands out as a primary expression of individual freedom (Titmuss, 2019b), based on the *choice* to give to strangers, without coercion or compulsion nor guaranty to be reciprocated (immediately or in the future). Pro-social behaviors have long been a meaningful object of enquiry for scholars across a wide array of disciplinary fields. Economic theorists, always notoriously concerned with the choices made by individuals and their underlying costs, are among those who spent a good deal of effort to investigate the individual decision to commit to the act of volunteering. In other words: why do people volunteer? While nobody would ever raise doubts about the rationale of someone else's decision to accept a (decently) paid job, many wondered which reasons may account for the seemingly irrational behavior of giving. Indeed, as summarized by Hustinx et al. (2010), when volunteering is conceived based on a cost-benefit logical framework, it may look like an activity more costly than beneficial to the person undertaking it. This is dramatically at odds with the fundamentals of economics, which postulate human behaviors to be self-interested and rational. Eluding the "participation paradox" inherent in volunteerism has often led to question the alleged absence, for the giver, of self-serving returns, though their origin and nature have been long debated. Indeed, different conceptual lines ensued, each bearer of a specific way of looking at the phenomenon, as well as at the set of conceptual problems associated with determining why individuals volunteer. In what follows, core distinctions between three main streams of theorizing are noted and the strengths of the one specifically espoused in this thesis outlined.

*Collective or public goods and externalities:* A first stream of theories assumes that individuals donate to increase the provision of collective or public goods and services, since increasing the welfare of others has a direct influence on one's own

welfare (Culyer, 2012). More poetically, someone said about blood donors: “As individuals they were, it may be said, taking part in the creation of a greater good transcending the good of self-love. To ‘love’ themselves, they recognised the need to ‘love’ strangers” (Titmuss, 2019d, p. 3). This calls into question the concept of externality, which occurs when the costs borne by an individual translate into benefits accruing to the community as a whole (Titmuss, 2019a). However, as frequently emphasized (Culyer, 2012; Hustinx et al., 2010), any appeal to pure altruism (the assumption that the giver is exclusively driven by an interest in recipients’ well-being) or to externality arguments is flawed by free-rider problems. In fact, externalities are public and, hence, non-excludable goods, of which anyone can take advantage even without having taken part in their production. Hence, volunteers would work for the benefit of all, regardless of whether or not others contributed. Precisely for these reasons, Culyer includes private charitable giving among the activities most exposed to the free-rider issue, which “*implies that no-one (save one whose marginal value of the external benefit most exceeds its marginal cost) has an incentive to contribute. Consequently, charities will have either no supporters at all or only one. Since this is plainly not so, there seems to be something wrong with the theory*” (2012, p. 94). Other arguments raised against the tenability of these theories point to the fact that, if volunteers pay regard solely to the actual levels of public goods in societies, then a crowding-out effect should result from an increase in their public provision. However, on empirical grounds, high levels of government spending in social welfare are found to be associated with high levels of volunteer activity (Hustinx et al., 2010).

Moral enforcement: One of the extra-welfarist theories advanced to solve the abovementioned incongruences (Culyer, 2012) rests on the assumption that ethical or moral evaluations rule human conduct. Thus, rather than appealing to the benevolence and public spiritedness of individuals, we turn again to rationality. Indeed, based on the Kantian concept of duty (Titmuss, 2019c), individuals behave morally and altruistically as they acknowledge – in a utterly rational fashion – that, if everyone succumbs into the temptation to free ride, the worst outcome will ensue. Albeit from a different stance, also Freeman (1997) referred to the concept of moral enforcement, or social obligation, seeing volunteering as something that people feel

morally obliged to do, especially when asked to, as the request to partake carries a sort of social pressure with it (Govekar & Govekar, 2002). As Titmuss noted while acknowledging that no blood donor could be depicted as purely altruistic: “*There must be some sense of obligation, approval and interest; some feeling of ‘inclusion’ in society; some awareness of need and the purposes of the gift*” (Titmuss, 2019d, p. 2). However, acknowledging the existence of socially enforced sanctions for not giving (i.e., blame, remorse, shame or guilt), suggests that social recognition may well be one of the benefits that volunteers accrue from volunteering and about which they care, as the following theories suggest.

*Private goods or consumption and impure altruism:* At this point, it becomes clear that conceptualizing these acts of voluntary giving solely in terms of genuine, disinterested and spontaneous altruism leaves many questions unanswered. Accordingly, other theoretical perspectives depart from the assertion that volunteers must derive, from their involvement in the volunteering process itself, some reward, private good or “utility”, conceivable as the satisfaction, pleasure or happiness we expect to gain from engaging in the act of giving (Culyer, 2012). This utility may simply stem out of “*satisfying the biological need to help*” (Titmuss, 2019a, p. 3) and the gratification derived from accomplishing something worthwhile or, more tangibly, the opportunity volunteering affords to socialize or develop career-relevant skills. In other words, to make sense of the empirical anomalies that pure altruism fails to explain, we need to assume that individuals are “impurely” altruistic (Andreoni, 1990), in that they get some personal benefits from their gift. The functional (psychological) approach (Clary et al., 1998), on which the studies presented in the following chapters are grounded, precisely starts from these premises. Indeed, it assumes that, in combination with or in place of pure altruism, individuals may be drawn to volunteering because of some private or selfish motives, which coincide with distinct psychological functions or needs that volunteering can satisfy. Of particular note is that this latter line of thought, which combines elements of service to others with the individual benefits that volunteers themselves derive in return for their efforts, is not incompatible with the perspectives of rational-choice theorists. According to these latter, volunteers would weigh costs and benefits of their participation and decide to participate only if profiting from it (for instance, by



enhancing their human capital, employability, social cohesion, self-efficacy, psychosocial and physical wellbeing, life satisfaction, civic mindedness, etc. - Hustinx et al., 2010). Moreover, such a view can be accommodated within extra-welfarist economics, in which: “*the non-goods characteristics of individuals (like whether they are happy, out of pain, free to choose, physically mobile, honest) and the ways in which goods and non-goods are distributed across the population*” or “*even the quality of the relationships between individuals, groups, and social classes*” can be interpreted as elements worthy of inclusion in a social welfare function (Culyer, 2012, p. 82).

### **1.2.2 Empirical context**

Having emphasized the theoretical underpinnings and conceptual significance of investigating pro-social behaviors, the next sections describe the research settings of the studies conducted, highlighting the relevance of the empirical component of this thesis. First, a brief overview of the Italian blood system is provided. Second, the social demand and wider cultural frameworks faced by the two mentoring organizations involved are delineated.

#### **1.2.2.1 An overview of the Italian blood system**

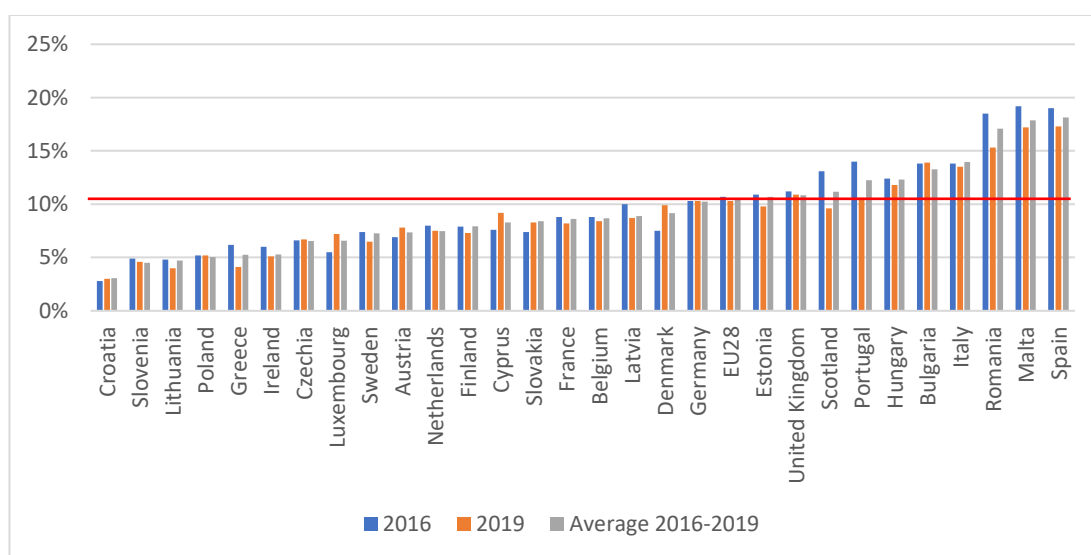
In Italy, the blood donation and collection system presents a unique setup, which made it a particularly interesting setting for the conduct of the study illustrated at Chapter 2. As in countries such as the UK, France and Ireland its coordination is under the remit of the National Health Service. Nevertheless, most of blood collection activities are managed by a volunteer-based NPO: Avis. The latter is by far the biggest player of the Italian national system, to the extent that, in years close to the conduct of the study, three-quarters of all Italian blood donors were members to this NPO (Ricciuti & Bufali, 2019). However, as opposed to the German and Belgian systems, where a comparable NPO claims a near-monopoly on blood collection, in Italy both privately- and publicly-run Blood Collection Agencies (BCAs) operate simultaneously (Cavazza & Jommi, 2013). Although, responsibilities can be allocated differently between private and public operators throughout the country, the Avis units involved in the study simultaneously oversaw the management of: i) blood collection; ii) donors’ recruitment and retention; iii)

awareness-raising activities promoting donation. Precisely because the last two operations are the exclusive prerogative of Avis (as opposed to publicly-run BCAs), the evaluation presented in the next chapter sought to gauge the socio-economic value stemming out of the distinctive interventions carried out by this NPO.

### 1.2.2.2 Comparing SBM interventions implemented in Scotland and Italy: youth educational disengagement and core cultural differences

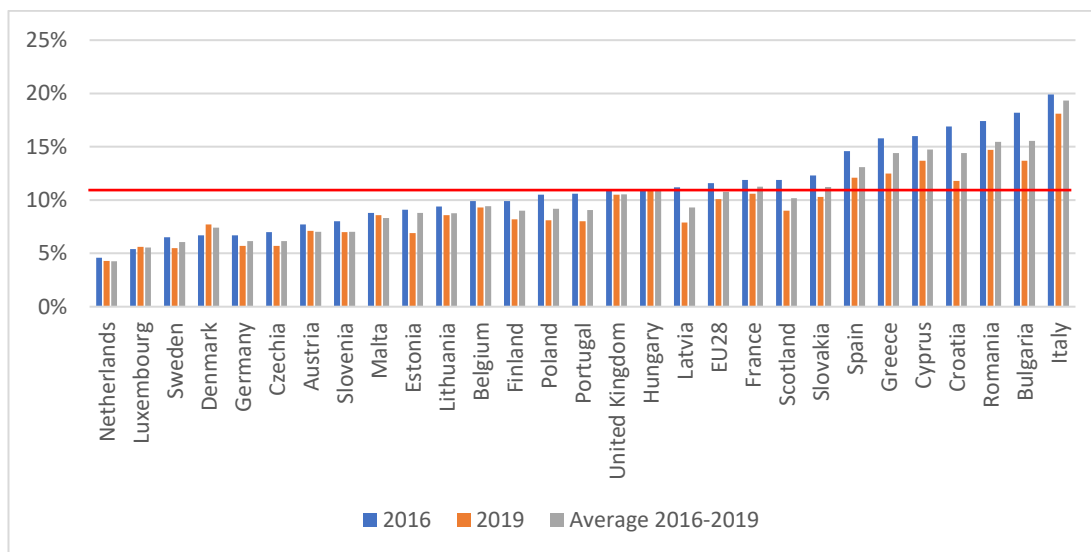
Several European countries are committed to fighting educational poverty and inequalities of access to knowledge and learning opportunities among youth. Indeed, as shown below (Figure 1 - 1 and 1 - 2), some Eastern and Southern European countries, alongside Scotland, had rates of premature school dropouts and young people who participate neither in the education system nor the labor market (NEETs) above the cross-EU average in recent years (Eurostat, 2021a, 2021b). Given the scarring effects of an early exclusion from education and employment (e.g., Feng et al., 2015) and the threats that this phenomenon poses to the sustainable development of countries, social interventions intended to tackle it gained momentum, including SBM (Ellis & Sosu, 2015; Kraft & Falken, 2021; Sosu & Ellis, 2014).

**Figure 1 - 1 Early leavers from education and training<sup>1</sup> by country (2016-2019)**



<sup>1</sup> Young people aged 18–24 with, at most, lower secondary degree and not in further education or training.

**Figure 1 - 2 NEET rate by country (2016-2019)**

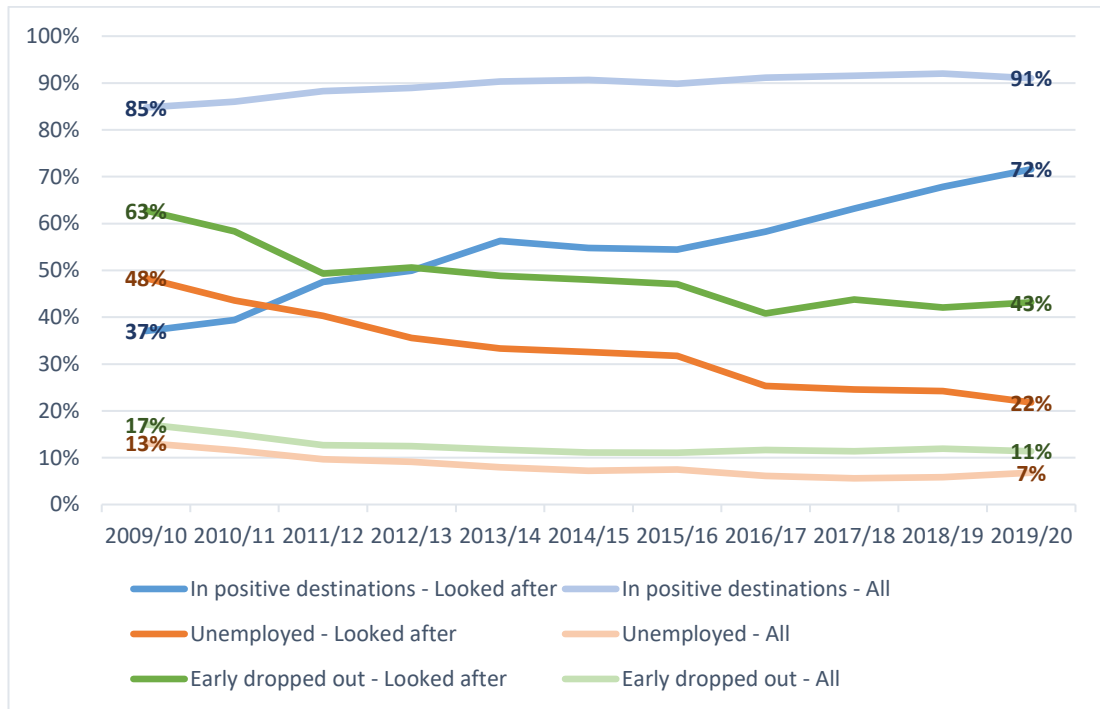


The two countries being considered from chapter 3 to 6 look somewhat similar in terms of urgency to deploy actions to address youth educational disengagement. Scotland not only has dropouts and NEET rates slightly above the cross-EU average (Figure 1 - 1 and 1 - 2), but some segments of its youth population are disproportionately affected by educational inequalities: young people in the care of public authorities<sup>2</sup>. They are, in fact, those primarily targeted by MCR Pathways, one of the two mentoring organizations involved in this research. As showed in Figure 1 - 3, in years close to the onset of the MCR program, the proportion of Scottish looked after school leavers who were not in positive destinations (PDs)<sup>3</sup> or unemployed after leaving secondary school or who left secondary school in the fourth year (also known as S4) or earlier was dramatically higher than the universal rate for pupils in Scotland (Scottish Government, 2021). More precisely, in 2009/2010, not only as many as 63% of care-experienced pupils did not stay on in school beyond the age 16 (compared to 17% for all students) but also just 37% of care-experienced school leavers transitioned to PDs (as opposed to 85%) and 48% of these young people were unemployed (against 13%). Although this attainment gap shrank over a decade (especially as regards the PDs indicator), the disparities are still substantial.

<sup>2</sup> Referred to as “looked after children” under the Children (Scotland) Act 1995. Recently, the term “care-experienced” has become increasingly used, since often preferred by those who themselves are or have been in the care system.

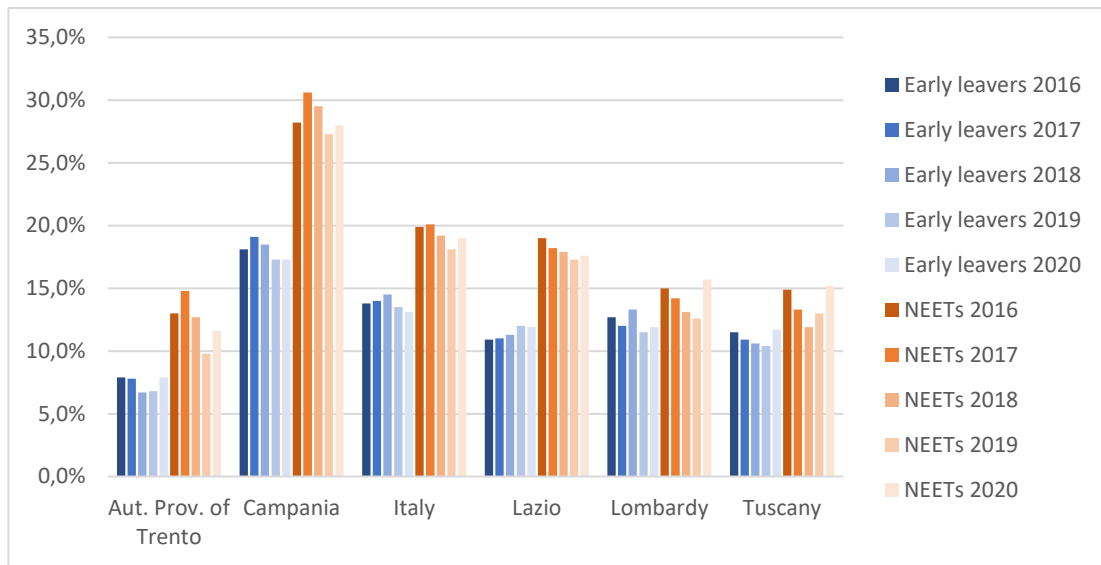
<sup>3</sup> Higher or Further Education, Employment or Training.

**Figure 1 - 3 Selected data on school leavers in Scotland (2009-2020)**



Italy, by contrast, is among the European countries most severely affected by the early departure of youth from the school system (Figure 1 - 1). The gap is even more apparent with respect to the share of young people neither in education nor the labor market (Figure 1 - 2), an indicator with respect to which Italy has proven to be the worst performing country. Furthermore, a closer look at data for the regions where SU – the second organization involved – currently operates (Figure 1 - 4) reveals that more southerly areas are hit particularly hard. Indeed, in 2020, Campania had a rate of early leavers four percentage points above the national average and a NEET rate even nine points higher.

**Figure 1 - 4 Early leavers from education and training and NEET rate by regions (2016-2020)**



Despite this point of contact, the two countries considered are appreciably dissimilar with respect to other features of interest for the studies conducted: the cultural ethos and welfare regime they feature. Some extant theories provide particularly informative conceptual foundations to examine the influence of cultural aspects on mentoring practices across countries. In particular, cultural dissimilarities can be conceived and made sense of by means of well-known polarities, which typically contrast: individualism and collectivism (Hofstede, 2011; Schwartz, 1999); weak and strong family ties (Reher, 1998); egalitarianism and hierarchy (Hofstede, 2011).

Individualistic cultures tend to give greater emphasis and value to the relative independence of individuals from social groupings. Even if participating in several loosely-knit networks, people's personal fulfillment, self-worth and validation mostly spring from expression of self and one's own distinctiveness. In collectivist cultures, social relations rather become a primary source of meaning and identity expression, which is strongly intertwined with the belongingness to certain in-groups, whose norms and traditional customs are willingly adhered to. In this respect, based on Geert Hofstede's seminal work (Hofstede, 1983), both the countries are to be considered as connoted by an individualist orientation. Nonetheless, it is worth emphasizing that the UK – with an index of 89 – turns out to be the most individualist country among European ones, with only the USA (where youth

mentoring first gained momentum) and Australia scoring higher. Even though the Italian country rating is only slightly lower (i.e., 76), interpreting these indices in relative and comparative terms (as suggested - Hofstede Insights, 2022) allows stating that Italy, when benchmarked with the UK, has a *less* individualist culture. This becomes even truer if we take into account the cultural changes occurred after Hofstede's initial studies, which were conducted between the 60s and 70s. Indeed, although individualism has been generally rising around the world (Santos et al., 2017a), the shift toward greater individualism has been more pronounced for the UK (Beugelsdijk & Welzel, 2018; Santos et al., 2017b). This leads us to assume that the cultural difference as regards this dimension is, currently, even more sizable.

Cultures will also differ with respect to familism, with weaker family ties in individualist than in collectivist cultures (Alesina & Giuliano, 2013; Gorodnichenko & Roland, 2012). In strongly individualist societies (among which the UK), nuclear families prevail, children are expected to become independent from parents and leave the household as soon as feasible and self-reliance is highly valued. Conversely, collectivist societies (or less individualistic and strongly family-centered ones, as with Italy) are dominated by larger kinship clans, where several generations mutually cooperate within the household. Individuals rely more on the assistance from larger family groups to satisfy uncovered welfare needs, with a general lesser involvement in voluntary activities (Realo et al., 2008).

Finally, in societies exhibiting high degrees of power distance, there is higher acceptance of a hierarchical order of social relations and older people can be a priori recognized as authoritarian figures. In contrast, the lower power distance characterizing more egalitarian cultures results in a greater appreciation for more informal/equal relations and inclusive decision-making. Once again, it has to be noted that the UK – which scores 35 under this dimension (Hofstede, 1983) – is among the countries with the lowest tolerance for power distance and, hence, *comparatively* less hierarchical than Italy (50) or the USA (40), which rather lie somehow halfway

**Figure 1 - 5 Core cultural differences between UK and Italy**



While Chapter 5 expressly examines how such cultural differences affect how mentors experience SBM and their implications on volunteer management practices, Chapter 6 documents the influence of cultural frameworks over the scalability of SBM programs.

### **1.3 Research aims and objectives**

Given these premises, this thesis primarily intends to explore and yield a better understanding of how NPOs can make the engagement of community stakeholders, and particularly of volunteers, wider and more sustained, while showing the promises of a variety of program evaluation techniques when it comes to deal with such a research problem. By addressing this overarching research aim, the main objectives pursued relate to both contributing to our understanding of the:

- Drivers of the sustained involvement of community stakeholders, particularly the volunteers, in the programs run by NPOs;
- Potential of evaluation in the setting of volunteer-based NPOs for enhancing volunteer and community engagement.

### **1.4 Research questions and approaches**

Having set the boundaries of the research problem, the research questions guiding each study primarily address the first objective. The second objective is, rather, fulfilled by means of the multi-method approach underpinning this dissertation, which gave an opportunity to showcase the applicability and potentials of a number of available and complementary evaluation techniques.

More specifically, Chapter 2 intends to answer the following research question: *what is the socio-economic value that BDAs deliver to their members and wider communities?* This latter has been addressed by running a Social Return on Investment (SROI) analysis which involved four units of Avis, the largest BDA operating in Italy. This type of economic evaluation entails the calculation of a ratio, wherein the benefits brought by social-purpose activities are monetized and then divided by the investments required to achieve them. The information returned was the amount of socio-economic value generated for each euro invested in the activities run by the BDA being evaluated.

The study at Chapter 3 mainly seeks to understand: *what is known, according to extant scientific knowledge, about the motives, outcomes, enablers and hindrances reported by those who mentor within educational settings? And what is the interplay among these constitutive elements of the mentor experience?* To address these research questions a systematic review was conducted and extant evidence-base transposed into a conceptual framework, using the Strategic Options Development and Analysis (SODA) mapping approach. The analyses performed not only returned a thorough account of the themes that dominate prior literature as to the four dimensions of interest, but also a graphic representation of the change process mentors go through, of use for better understanding when and how to intervene to achieve looked-for outcomes.

At Chapter 4, the research questions addressed are: *what is the Theory of Change according to which a SBM scheme achieves intended mentor outcomes? Does it differ from the literature-based conceptual framework derived at Chapter 3? What can be learned from these points of differentiation?* To achieve such knowledge gains, a Logic Analysis was performed, drawing on interviews conducted with 12 volunteer mentors of the MCR Pathways SBM scheme. This three-step program theory-driven evaluation was used to compare the MCR Pathways program's theory against the evidence brought by available research, indicating in which respects the former fitted with or deviated from current knowledge about best-practices and which strategies may enhance the program's impact potential.



The research questions guiding Chapter 5 are: *do adult volunteers, in Scotland and Italy, experience being mentors of vulnerable youth differently? With which implications for research and practice?* The cross-cultural comparison carried out adopted a mixed-method design, so that qualitative evidence has been used to formulate hypotheses to be further tested through the use of a quantitative dataset. By integrating the two sets of findings, the study draws attention to and documents similarities or discrepancies in Scottish and Italian mentors' self-reports as to multiple dimensions of their mentoring experiences.

Finally, the study illustrated at Chapter 6 puts the issue of widening community engagement into context by asking: *which are the contextual enabling conditions that need to be in place to devise effective strategies to scale SBM interventions? And in which ways can NPOs respond to and act upon those contextual conditions to drive scaling? Facing which risks?* The qualitative evaluation rested on data from interviews conducted with key informants from MCR and SU and compared the routes pursued by the two NPOs to scale their interventions at the country level. Drawing on a stimulus-context-response framework, the study provides evidence of what catalyzed scaling, how the contexts respectively faced influenced scalability, the organizational responses activated, as well as the risks that the organizations incurred while scaling. Overall, it provides a reference framework for those NPOs that are planning or taking action to widen the reach of their programs.

### **1.5 Philosophical underpinnings**

This section discloses the philosophical positioning to which the studies conducted over the course of this PhD aspired to conform. First, it briefly outlines the ontological and epistemological foundational assumptions underpinning this paradigm. Secondly, it illustrates in which respects the latter can represent a step forward from the limitations often undermining mainstream evaluation research, largely dominated by evaluations ingrained in a positivist stance. Finally, it elucidates the implications of such a positioning as to the methodological approaches selected for the conduct of the studies illustrated from Chapter 3 to Chapter 6.

The paradigmatic stance that better reflects the researcher's world view is critical realism (Bhaskar, 2008; Sayer, 2000), which rests on an ontological realism and an

epistemological relativism. On the one hand, it posits that reality exists out there, regardless of our perception and understanding of it. Furthermore, reality is conceived as multi-layered and stratified, to the extent that the empirical constitutes the domain of experience and observation of those events that take place in the actual domain, which, in turn, originate from deep generative processes or structures operating in the domain of real. On the other hand, unlike naïve realism, this reality is seen as difficult to apprehend and not readily accessible, since actual events, when observable, are unavoidably understood through “*fallible and theory-laden*” interpretations (Easton, 2010, p. 119).

Critical realism has been deemed a promising positioning for evaluating social interventions reliant on pro-social behaviors, while stepping back from a dominant empiricist and positivist stance informing much of the management science research and its major drawbacks (Mingers, 2006). These shortcomings mainly pertain to three crucially relevant dimensions, illustrated here below.

*Understanding (social) reality and causality:* From a critical realist perspective, the linear and Humean conceptualization of causality carries an impoverishing view of ontology. Indeed, in an empiricist perspective, the possibility to gain valid knowledge – and, ultimately, the very existence – of phenomena *beyond* those empirically observable is utterly denied. The constant conjunction theory of causation rests on the belief that science can actually uncover universal laws that rule both natural and social phenomena. Hence, the privileged route for causal explanation is capturing and gauging those factors that are assumed to mechanistically predict the occurrence or non-occurrence of phenomena. Clearly, such a view struggles to account for the inherently multidimensional, complex, evolving and context-dependent nature of social programs or phenomena. Conversely, espousing a critical realist “generative” conception of causation, science and explanation should be seen as directed to unveil those hidden generative processes that, if at play, would lead to the occurrence of the actual events we might empirically observe and experience.

*Measuring reality:* The adoption of strictly quantitative, variable-centered statistical modelling techniques rests on the idea that, even in the field of social and behavioral

sciences, the most suited way to derive nomothetic generalizable results is reducing ontological entities to their measurable properties and decomposing any object of analysis into lower-level variables (Mandara, 2003). Critical realism does not conform to such an approach, according to which multifaceted social and behavioral phenomena are, once again, reduced to unidimensional entities, devoid of any complexity, depth and inherent heterogeneity. However, it is equally distant from an anti-realist interpretive positioning, which would delegitimize any attempt at capturing an inherently complex social world through quantitative modelling. Rather, the interpretation of context-dependent, culturally embedded, subjective meanings and statistical modelling should be seen as equally legitimate instruments to support an (always fractional) representation and understanding of phenomena. This process of understanding is precisely intended as a going backwards from recurrent associations in the occurrence of phenomena to the deep processes generating them, and is usually referred to as abduction.

*The role of prior research:* Questioning the predictive accuracy of modelling practices either based on completely data-driven approaches or exploiting extant (empirical) research with the sole purpose of locating key variables and relationships to gauge, critical realist research aspires to draw on both the empirical findings and theoretical heritage brought by extant literature in a sensible way. The pursuit of a constant interplay between empirical observations and pre-existing theoretical frameworks is precisely what distinguishes abductive reasoning (Dubois & Gadde, 2002, 2014) from both entirely data- or theory-driven approaches.

That being said, it is important to introduce some final remarks to highlight the core implications of having espoused the philosophical underpinnings of critical realism. First, it has to be specified that a conscious adhesion to this particular stance occurred after the completion of the first study (Chapter 2). Indeed, in that case, the generation of a preliminary program theory strongly relied on a theory-driven approach. The collection of qualitative empirical evidence via focus group was guided by a set of preconceived thematic categories and instrumental to test the plausibility and exhaustiveness of formerly formulated assumptions. The objective was to validate the key areas of impacts to be quantified and monetized through subsequent analyses, which relied on techniques not so suited to give an

account of the idiographic nature of the research phenomenon. By contrast, the approaches that characterized the remaining studies heavily reflect the shift in positioning occurred, which is believed to have significantly enhanced the explanatory power of inquiries, in the ways described below.

*Formulating logical inference abductively:* As regards chapters 3-4-5-6, the processes of qualitative data analysis, as well as theory development and refinement, were conducted abductively, to the extent that they recursively attempted to match empirical data collected on field and extant scientific knowledge embodied in prior research. Indeed, analyses were performed in the spirit of the abductive process of “systematic combining” described by Dubois & Gadde (2002, 2014). According to the latter, the researcher engages in a continuous swing back and forth the two domains of established theoretical frameworks and empirical observations, allowing the latter to reveal unanticipated though noteworthy dimensions of the research problem, which in turn may lead to a refinement of the former, which in turn can inform further data collection. This is particularly apparent for the Logic Analysis described at Chapter 4, which, not surprisingly, is expressly rooted in the critical realist paradigm (Brousselle & Buregeya, 2018). This three-step evaluation should not be conceived as a sequence of inductive reasoning (where, starting from the evidence respectively yielded by individual studies and empirical observations, general theories are derived) and deduction (where we test the tenability of the hypotheses raised by the more general theory against the particular instance). Rather, its first two steps (i.e., producing the program-specific Theory of Change and literature-based Conceptual Framework) were performed constantly seeking a cross-fertilization between extant scientific knowledge and fresh evidence, so that the derivation of the two models turned out to be neither entirely theory-driven nor entirely data-driven. Finally, the conclusive “plausibility check” did not constitute a “theory testing” exercise – which would entail a prior attachment of a greater validity and legitimacy to one of the two outputs. Conversely, any inconsistency between them was expected to add to our understanding, allowing the identification of the strengths and weaknesses characterizing the specific intervention model being studied.

*Moving towards Context-Mechanism-Outcome patterns:* A distinguishing feature of realist evaluations is the ambition to not exclusively focus on whether social interventions or ventures worked, but to explain the reasons of their success or failure, addressing the question: “*What works, for whom, in what circumstances and why?*” (Pawson & Tilley, 1997). Realist assumptions about causality lead us to see events as the result of a blend of multiple deep causal mechanisms. In other words, the mechanisms that NPOs introduce to implement (or scale) an intervention are not sufficient to explain observed outcomes. Evaluators also need to take into account the context in which these mechanisms are activated. This evaluation approach, embedded in the well-known formula “Context + Mechanism = Outcome (C + M = O)” (Pawson & Tilley, 1997), has been implicitly applied in Chapter 6. Indeed, that study explored which contextual factors and organizational responses affected the scalability of two SBM programs, both in terms of results achieved and risk faced. This, maximizing the process-orientation and context-dependency implied in realist evaluations, sharpened the understanding of how scaling processes unfold in their dynamic interaction with the environment.

*Using mixed-method designs:* Coherently with the conception of multi-layered ontology and epistemological fallibility posited by the critical realist paradigm, the interpretation of context-dependent subjective meanings and quantitative analyses are complementary means of explanation. Consistently, the mixed-method study presented at Chapter 5 integrated multiple sources of evidence and analytic techniques to represent and understand the research phenomenon. This approach, more than merely triangulating sources of evidence to the benefit of data validity and accuracy, was seen as a promising vehicle to disclose potentially unknown aspects of the phenomena being evaluated and to ameliorate the chances to achieve a more comprehensive view of real causes, supporting the critical assessment of rival explanatory models. In sum, as others argued, methodological pluralism can bring about a more holistic representation, and complete understanding, of complex social phenomena, unearthing information at multiple levels (Sosu et al., 2008).

## 1.6 Thesis structure

This thesis entirely concerns evaluation research with(in) NPOs, particularly focusing on the practices and processes through which these organizations can escalate and consolidate volunteer and community engagement. Here below, the abstract of each subsequent chapter is reported.

*Chapter 2:* Although research on blood donation abounds, no studies have yet attempted to estimate the socio-economic value generated from Blood Donors Associations (BDAs). To fill this gap, the authors ran a Social Return on Investment (SROI) analysis on four units of the largest BDA in Italy, the Association of Voluntary Italian Blood Donors (“Avis”). This study used multiple methods for data collection and analysis. A systematic literature review helped the identification of proper financial proxies to highlight the economic value of the social and health impacts experienced by Avis members. A focus group with key informants gathered their views on the areas of impact selected for the analysis: early detection of diseases, adoption of healthier lifestyles, social capital, human capital, personal satisfaction and reinforcement of a ‘giving culture’. Primary data collection involved (a) an Activity Based Costing analysis (b) a self-reported questionnaire to 1,066 BDA members and unassociated donors enabling the comparison of the blood donation experience of these two groups. The SROI analysis resulted in four positive ratios, varying between €1.70 and €13.80. This study contributes to the knowledge on impact evaluations in NPOs. Policy implications refer to BDAs deserving financial and material support for their capacity to generate positive social impacts.

*Chapter 3:* To meet students’ demand for mentoring, it is critical to further our understanding of the most effective ways to recruit and retain volunteers that mentor within educational settings. This systematic literature review summarizes the findings of 57 pieces of empirical research into mentors’ motives and rewards, negative outcomes, as well as into the factors that trigger or discourage their initial and ongoing commitment. It finds that mentors’ motives and benefits primarily relate to knowledge, ego and career development and that, alongside a broad range of positive – often unanticipated – outcomes, mentors experience a variety of adverse emotions (e.g., feeling discouraged or frustrated, hesitant or fearful). It also identifies

a plethora of factors – programmatic, relational, individual or contextual – that often simultaneously enable and hinder the achievement of desirable outcomes. Finally, it discusses how study findings can help progress forward mentoring practice and research.

*Chapter 4:* Despite the diffusion of school-based mentoring, little research has focused on evaluating its impacts on the volunteer mentors and from their perspective. This article addresses persisting gaps in knowledge by conducting a Logic Analysis of the Scottish MCR Pathways school-based mentoring program. The perceptions of 12 mentors were explored through semi-structured interviews, thematically analysed and mapped out to produce a unified Theory of Change for this specific mentoring scheme. Then, through a direct logic analysis, its plausibility was assessed against the evidence-base yielded by relevant research literature, similarly captured in a cognate conceptual framework. The study highlights a mismatch between what mentors expected and actually gained from the experience, as participants not only discussed gains aligned with their original – mostly altruistic – motives for mentoring but also a wide range of unanticipated, more self-oriented positive outcomes. Also, the analysis clearly indicates that, while some themes (such as, the desire to give effect to altruistic values or the achievement of understanding and self-enhancement gains) turn out to be prominent both in the context of the MCR Pathways program and the wider literature on mentoring in educational settings, some others acquire a minor (e.g., developing friendships) or greater (e.g., being driven by community concerns or normative commitment) relevance in the former field. Ultimately, the theory-building process proposed produced several insights not only into the motivating factors and attainable outcome that program directors can leverage to attract growing numbers of volunteers or the ways to make the mentoring experience increasingly rewarding – so as to retain participants’ involvement – but also into how scientific knowledge can be advanced.

*Chapter 5:* Cross-cultural research can play a decisive role in better understanding what drives, in differing contexts, mentors’ decision to commit to and stick with mentoring programs. This mixed-method study explores how adult volunteers, from Scotland and Italy, viewed their experiences as mentors of vulnerable youth. While several volunteer management practices were found to be generally desirable (e.g.,

increasing mentors' awareness about potential negative consequences, their sense of self-efficacy or interactions among mentors), the suitability of others appeared context-dependent (e.g., raising awareness about specific gains that can be accrued by being mentors, as with in Scotland, as opposed to ensuring that mentors actually realize anticipated gains, in Italy). Ultimately, the study develops the evidence-base about which, and by what means, culture-sensitive approaches can foster mentors' initial and ongoing engagement.

*Chapter 6:* Social innovations, encouraging the rise of novel participatory delivery and governance networks, are increasingly deemed powerful vehicles to address unmet societal needs. Nonetheless, current research into the contexts, mechanisms and risks of their scaling appears still limited. This study fills some knowledge gaps by comparing two school-based mentoring interventions. First, it shows that fairly similar stimuli can trigger very diverse ambitions and paths to scale. Second, it finds that some strategic levers (e.g., entrepreneurial, political, coalition-building skills; evaluation), combined with cultural and policy frameworks conducive for change, cross-sector collaborations and access to network resources, help achieve more rapidly a larger scale of expansion. Finally, it highlights which risks more strongly relate to growth speed and which to less favorable environmental conditions, providing useful information for future research, policy and practice.

*Chapter 7:* This concluding chapter, at first, delineates the practical, conceptual and methodological implications of the research previously illustrated. Next, it develops a reflection as to the perils and challenges of conducting evaluation research with(in) NPOs. Subsequently, it outlines some ways forward to mitigate identified risks and assure that evaluation research truly plays a role in helping NPOs address some of the bigger challenges facing societies. Finally, after having illustrated the dissemination strategy devised for the various research outputs, some personal reflections on the PhD experience and final remarks are provided.



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## **Chapter 2: The health and social impact of Blood Donors Associations: A Social Return on Investment (SROI) analysis**

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## 2.1 Introduction

Blood donation has been a popular topic in the socio-economic literature through the development of at least three streams of research. First, research devoted to the analysis of the so-called “healthy donor effect” has investigated how blood donation relates to health outcomes experienced by donors. It has sought to understand if blood donation represents a determinant of a better health status or, conversely, if the latter is simply a result of the screenings implemented while assessing the eligibility of donors (Atsma, Veldhuizen, Verbeek, de Kort, & de Vegt, 2011; Gallerani et al., 2014; Shehu, Hofmann, Clement, & Langmaack, 2015).

Second, a plethora of studies has addressed the implications of the ever-increasing shortages in blood supply faced by national blood systems in different countries. From this perspective, the achievement of a deeper understanding of the motives that spur blood donors’ willingness to donate is considered an essential step to maintain the self-sufficiency of national blood systems (Iajya, Lacetera, Macis, & Slonim, 2013; Karacan, Seval, Aktan, Ayli, & Palabiyikoglu, 2013; Roberts & Wolkoff, 1988). Consequently, the effectiveness of the recruitment and retention strategies of Blood Collection Agencies (BCAs) and/or Blood Donors Associations (BDAs) becomes a fundamental driver for donation (Chliaoutakis, Trakas, Socrataki, Lemonidou, & Papaioannou, 1994; Hinrichs et al., 2008). While a considerable amount of research has investigated blood donors’ motivating factors (Alfieri, Guiddi, Marta, & Saturni, 2016; Bani & Strepparava, 2011; Evans & Ferguson, 2014; Guiddi, Alfieri, Marta, & Saturni, 2015; Nilsson Sojka & Sojka, 2003), most studies in this field provided empirical evidence about the relative incidence of key drivers on the individual decision-making process leading to donation (Bednall, Bove, Cheetham, & Murray, 2013; Boenigk, Leipnitz, & Scherhag, 2011; Ferguson, 2015; Gillespie & Hillyer, 2002; Masser, White, Hyde, & Terry, 2008), leaving a research gap in the estimation of benefits based on monetary values or in the calculation of the socio-economic value generated by BDAs’ activities.

Third, the health economics literature has given several contributions to the field, through the application of economic evaluations to the study of blood donation. However, economic evaluations focus on specific aspects of the blood supply chain –



such the suitability of alternative screening strategies for eligibility assessments (Fischinger, Stephan, Wasserscheid, Eichler, & Gärtner, 2010; Sarov et al., 2007) or of autologous donation (Lee et al., 1997), and have not yet assessed the overall blood donation experience or the role played by BDAs in the generation of incremental value to the benefit of their members (terms that will be used hereafter to identify blood donors and/or volunteers belonging to a BDA).

This gap exists even in the social science literature and Social Impact Evaluations (SIEs) in particular. Far from representing a ‘newcomer’ in nonprofit studies, this stream of literature results from the deep-rooted necessity for nonprofit organizations (NPOs)<sup>4</sup> to provide evidence of the effectiveness of their activities in addressing social needs, and their efficient resource use (Harlock, 2013). Consequently, a growing number of NPOs are accepting the challenge of impact measurement (Ógáin, Lumley, & Pritchard, 2012). This tool is functional from multiple perspectives, including performance management and resource allocation, people- and fund-raising strategies, communication, and accountability towards stakeholders (Arvidson, Lyon, McKay, & Moro, 2013; Harlock, 2013; Maier, Simsa, Schober, & Millner, 2015).

Because of this gap in the current knowledge, the authors sought to run an empirical evaluation of the impacts experienced by blood donors and volunteers who are members of a NPO like a BDA, both on the health and wellbeing of the donor and volunteer and on the social and relational sphere. Thus, the research question driving the study is: does the existence of a BDA generate a positive and desirable socio-economic value to its members?

To address this question, a Social Return on Investment (SROI) analysis was performed, consisting of a financial assessment of socio-economic value to compare “a project’s net benefits to the investment required to generate those benefits over a certain period of time” (Emerson & Cabaj, 2000, p. 11). More specifically, a retrospective analysis was performed through an “evaluative” SROI (Nicholls, Lawlor, Neitzert, & Goodspeed, 2012, p. 8), with an annual time horizon (data refer

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<sup>4</sup> Term used in lieu of “Third Sector Organizations” (TSOs), adopted in the published version of the article, for the sake of consistency.

to 2014, the most recent year with complete and reliable data in the Avis database). The applied formula is as follows:

$$\text{Net SROI}_t = \frac{\text{Present Value of impacts}_t - \text{Value of inputs}_t}{\text{Value of inputs}_t}$$

In other words, SROI “*tells the story of how change is being created by measuring social, environmental and economic outcomes and uses monetary values to represent them*” (Nicholls et al., 2012, p. 8) in such a way that the resulting ratio provides a synthetic representation of the value generated for each euro invested in the evaluated project.

The value of this methodological choice is twofold. First, while a long tradition of established evaluation methods exists in health and healthcare, including, among others, Cost-Benefit Analysis, Cost-Effectiveness Analysis and Cost-Utility Analysis (Drummond, Sculpher, Claxton, Stoddart, & Torrance, 2015), recent studies have reported a relatively low usage of the SROI methodology in the health sector (Banke-Thomas, Madaj, Charles, & van den Broek, 2015; Millar & Hall, 2013) and particularly in the field of blood donation. Thus, this study contributes to the blood donation literature by delivering a SROI analysis in a severely understudied field. Second, SROI is a suitable method to achieve a concise and highly intuitive measure of costs and benefits while simultaneously allowing a proper degree of stakeholder engagement (Arvidson, Lyon, McKay, & Moro, 2010, 2013; Simsa, Rauscher, Schober, & Moder, 2014) and performance evaluation (Cordes, 2016). Therefore, this study also nurtures the literature on SIE by proposing a method for evaluating the social benefits of NPOs, which is a highly debated topic in both academia and policy-making, but still lacking robust evidence to date.

Italy is a perfect case study because of the specific characteristics of the country’s blood system configuration and due to the normative shifts affecting its nonprofit sector development. On the one hand, although the Italian blood system is coordinated by the Italian National Health Service (NHS) (as in the UK, France and

Ireland), a significant share of blood collection activities is managed by a NPO called Avis (“Associazione Volontari Italiani del Sangue”, Association of Voluntary Italian Blood Donors), the largest BDA in the country by far, covering 75.17% of all Italian blood donors in 2014 (Bufali, Fiorentini, & Calò, 2017). For this reason, Healy defined the Italian system a “community blood bank model” (2000, p. 1640). However, unlike countries such as Germany and Belgium, where the Red Cross can claim a near-monopoly on blood collection, Italy is experiencing a sort of duopoly formed by privately- and publicly-run BCAs, similar to Spain (Cavazza & Jommi, 2013). On the other hand, the debate on SIE has recently acquired an enormous salience in Italy, as it is highly connected with the recent Reform of the Third Sector (Law 106/2016), approved after a long gestation in July 2016, which heightens the need for NPOs to provide evidence of their ability to generate positive impacts on the community. For all these reasons, Italy is now a fertile ground for experimentation.

## **2.2 Research design and methods**

This is a pilot study that uses the following multiple methods for data collection and analysis (Table 2 - 1).

**Table 2 - 1 Research stages, aims and methods**

<b>Stages</b>	<b>Aim</b>	<b>Method</b>
<b>Exploration</b>	Background on method (SROI) and financial proxies	Systematic literature review
	Identification of pilot units	Sampling
<b>Data Collection</b>	Identification and decision on the areas of impact	Focus group
	Quantification of inputs	Review and re-classification of balance sheets
	Quantification of benefits	Survey
<b>Data Analysis (SROI Analysis)</b>	Cost analysis and valorization of non-monetized inputs	Activity Based Costing (ABC) Analysis
	Monetization of the benefits	Application of proxies to survey results
	SROI ratios	Application of SROI formula

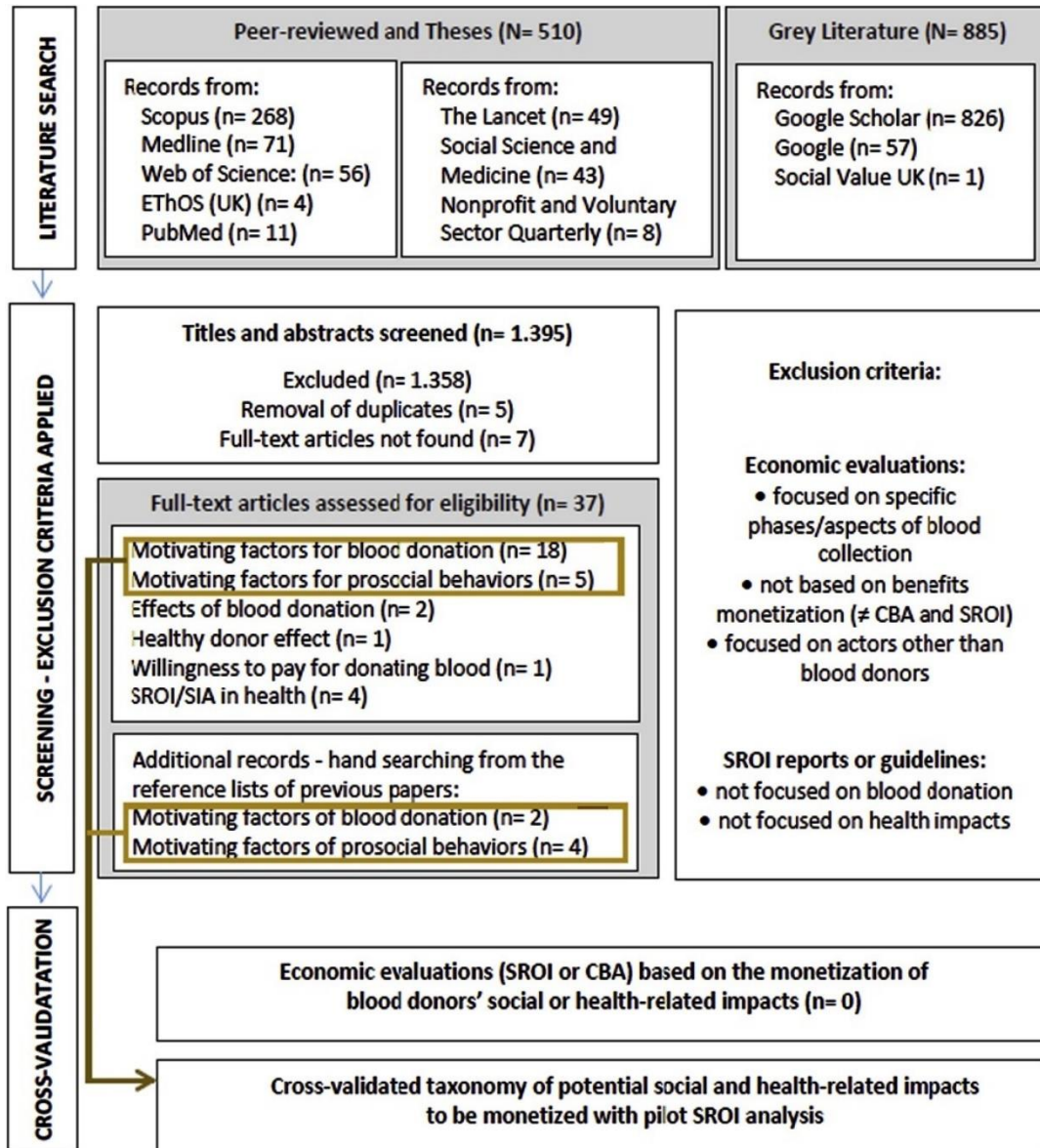
## **2.2.1 Stage I – exploration**

### **2.2.1.1 Systematic literature review**

A systematic literature review investigated the contributions of previous economic evaluations of the socio-economic value provided by BCAs or BDAs (Fig. 2 - 1). It aimed to provide exhaustive coverage of studies with at least one of the following focuses: economic evaluations based on the monetization of the impacts experienced by blood donors; the motivating factors influencing blood donation or, more broadly, prosocial behaviors; and/or the methodological guidelines concerning the use of SROI to account for the impacts of health interventions. The authors collected

both published and “grey” literature, including doctoral theses and institutional reports. Peer-reviewed articles and dissertations were extracted from Scopus, Medline, Web of Science and Ethos, plus directly sourced from relevant journals (Social Science and Medicine, The Lancet, Nonprofit and Voluntary Sector Quarterly). The choice of databases and journals reflected the multidisciplinary angle of the study by addressing both health and nonprofit studies. Search strategies were as follows: “social return on investment” AND/OR “blood donation”, in combination with: (social impact\*); (social impact\*) AND (nonprofit); (social return on investment OR cost-benefit analysis); (association\*) AND (social capital); (association\*) AND (CBA); (cost-benefit analysis) AND (social impact\*); (human capital) AND (social capital) AND (self-esteem). Furthermore, sources were searched on PubMed and Google Scholar for suggested articles labelled as “similar” to the previous ones, and on specific repositories of organizations related to the topic, i.e. Social Value UK for the use of SIE methods.

**Figure 2 - 1 The systematic literature review process**



In total 1395 studies were yielded for possible inclusion. A screening of the titles and abstracts revealed two types of contributions to be excluded:

- 1) Economic evaluations focused only on specific phases of blood donation or not based on benefit monetization (other than CBA and SROI), or focused on actors other than blood donors;
- 2) SROI reports not focused on blood donation, or SROI methodological guidelines not focused on health impacts.

Once removed duplicates, 31 papers were assessed as potentially relevant and, after a screening of their reference lists, 6 articles were added.

The authors independently analyzed each study and entered the relevant information into an electronic coding form, before meeting to compare their findings and resolve inconsistencies through discussion. Agreement was reached on the lack of economic appraisals estimating the full socio-economic value provided by BCAs or BDAs. The review supported the development of a cross-validated set of categories representing the social and health impacts pursued by blood donors. This would form the basis of an exploration of the financial proxies capable of providing a monetary expression of the benefits to be included in the SROI analysis.

### **2.2.1.2 Sampling**

This pilot study involved the selection of a narrow sample of Avis units (4) with the aim of ensuring an acceptable level of coherence with the structural and organizational features of Avis. The number is far from being representative of the Avis units scattered through the country, but still consistent with a pilot in-depth study, able to offer suggestions and uncover limitations for potential replicability. The authors built the ideal sample according to three selection criteria: (a) organizational model; (b) geographical location; and (c) size (i.e., the annual volumes of bags of whole blood and blood components collected).

*Organizational model:* the ideal units operate at the municipal level and are distinctive in that BDAs oversee the simultaneous management of the following three activities: blood donors' recruitment and retention, blood collection and activities related to raising awareness and promoting blood donation. This strategic choice was based on two considerations. First, this model is the most widespread configuration adopted by BDAs in Italy (representing, in 2014, 71% of the cases in which Avis directly manage blood collection activities, and 36% of all BCAs operating in the country (Bufali et al., 2017)). Second, the fact that the three activities are carried out by one unit allow the researchers to directly correlate the impacts experienced by members with the entire spectrum of inputs and costs involved in carrying out these activities.

*Geographic location:* the ideal sample reflects the relative presence of the selected organizational model in the country (Table 2 - 2).

**Table 2 - 2 AVIS organizational model's diffusion in the country**

	<b>Model's diffusion</b>	<b>Units to be included</b>
<b>NORTH</b>	42,58%	2,1
<b>CENTRE</b>	25,16%	1,3
<b>SOUTH</b>	32,26%	1,6

*Size:* the ideal sample includes both medium-sized and large units in terms of volumes of blood collection. The size has implications in terms of economies of scale and economic efficiency gains. Also, this variable may exert a controversial influence with respect to the scope of impacts (in larger BDAs, a higher number of members can be positively affected) and the intensity of impacts (a wider membership may result in a weaker relational component implied in the donation experience).

Taking all these criteria into consideration, the ideal sample was formed by 5 units, which received a formal request to participate in the study. Although all the units agreed to participate, one unit lacked a comprehensive mailing list of its donors, an essential asset for the submission of the online survey. Due to this constraint, the unit was excluded from the analysis. Thus, the final sample for the pilot study consisted of 4 units (Table 2 - 3). From here onwards, the units are designated by progressive Greek letters, to respect the anonymity of respondents as indicated in the research's Informed Consent form (details below).



**Table 2 - 3 The sample of units included in the study**

	$\alpha$	$\beta$	$\gamma$	$\delta$
<b>Geographical location</b>	South	North	Center	South
<b>Municipal level</b>	✓	✓	✓	✓
<b>Organizational model (activities directly managed by the BDA)</b>				
<b>Awareness and promotion</b>	✓	✓	✓	✓
<b>Recruitment and retention</b>	✓	✓	✓	✓
<b>Blood collection</b>	✓	✓	✓	✓
<b>Members</b>	4.352	5.797	5.245	10.460
<b>Bags collected by the BDA</b>	6.522	3.527	5.169	15.284
<b>Of which were plasma</b>	434	–	330	3.703
<b>Bags collected by the public run BCA of reference</b>	1.093	7.947	286	–

### 2.2.2 Stage II – data collection

The data collection process included a range of qualitative and quantitative research methods, aimed at fulfilling different purposes.

#### 2.2.2.1 Focus group

The identification of the impacts perceived by BDA members was achieved through a focus group, which stimulated an open debate among 9 key informants who shared the common characteristic of being both blood donors and volunteers for Avis. The selection of key informants followed the criteria of representativeness in terms of gender and geographical location of their BDA (Table 2 - 4). In all, 67% of the informants were aged between 26–35 years old and the remaining 33% between 36–45 years old.

**Table 2 - 4 Profile of key informants who participated in the focus group**

<b>Location</b>	<b>Distribution of Italian Avis members</b>	<b>Individual participants</b>	<b>Gender</b>	<b>Distribution of Avis members by gender</b>	<b>Individual participants</b>
<b>North</b>	60%	5	M	67%	3
			F	33%	2
<b>Center</b>	19%	2	M	66%	1
			F	34%	1
<b>South</b>	21%	2	M	66%	1
			F	34%	1

The focus group, led by one of the authors with the assistance of a National Avis employee, aligned with the well-established Donaldson’s approach to theory-driven evaluation (Donaldson, 2007). The protocol followed mainly served as a guide to elicit stakeholders’ view about the outcomes respectively yielded by being a blood donor member of Avis and by volunteering for this BDA. The evidence gathered has been used to test the plausibility and exhaustiveness of the preliminary program theory derived from consulting experts and from the systematic literature review described. In doing so, this modelling effort fits within a post-positivist position and conforms to a theoretical approach (Braun & Clarke, 2006), since the collection and analysis of evidence have been oriented by preconceived thematic categories stemming from researchers’ tacit knowledge. The focus group has been audio-recorded, transcribed verbatim and the evidence gathered analyzed by the two authors. This resulted in a further validation of the areas of impacts to be included in the quantitative analysis, which are as follows.

*Early diagnosis of undetected diseases:* the assessment of blood donor eligibility may allow the detection of some diseases (such as Diabetes Mellitus type II, Hypercholesterolemia and Hereditary Hemochromatosis), enabling the selection

of the most suitable countermeasures to halt or to slow down their natural progression.

*Adoption of a healthier lifestyle:* donors or volunteers may engage in health-conscious behavior (in terms of nutrition, physical activity, smoking, sexual behaviors, substance and alcohol consumption) because they belong to a NPO that promotes certain values and lifestyles.

*Personal satisfaction:* in accordance with the widely recognized assumption that giving may be emotionally rewarding (Clary et al., 1998; Evans & Ferguson, 2014; Gillespie & Hillyer, 2002; Nilsson Sojka & Sojka, 2003), individual may gain returns from the fulfillment of an act of altruism.

*Social capital:* as some authors have pointed out (Alfieri et al., 2016; Bani & Strepparava, 2011; Guiddi et al., 2015), the very opportunity of establishing relationships while donating or volunteering can represent a benefit pursued by the individuals who take part in the networks flourishing within BDAs. The concept is here intended as “*the sum of the actual and potential resources embedded within, available through, and derived from the network of relationships possessed by an individual or social unit. Social capital thus comprises both the network and the assets that may be mobilized through that network*” (Nahapiet & Ghoshal, 1998, p. 243).

*Human capital:* as the literature on the ‘willingness to give’ points out (Alfieri et al., 2016; Clary et al., 1998; Guiddi et al., 2015), the acquisition of knowledge, competences and soft skills – in this case, through the participation in trainings activities offered by Avis – may foster the personal and professional growth of those involved.

*Reinforcement of a ‘giving culture’:* finally, the individual’s experience as an Avis member may result in a higher propensity to make charitable contributions or to further volunteer, to the benefit of other NPOs.

#### **2.2.2.2 Review and reclassification of balance sheets**

A key component in the calculation of SROI is the identification of the total amount of resources necessary for the implementation of BDAs’ activities (the total

“inputs”). To do so, a proper allocation of costs incurred in the following areas is needed: retention/recruitment; awareness/promotion; training (public or internal audience); donors’ acceptance; eligibility assessment; sample taking; post-donation services (e.g. refreshment, periodic health checks); conservation and storage of the collected bags; transportation to Blood Centers. All these costs related to 2014 were, in turn, categorized as: consumables, equipment, human resources, and buildings. With the help of a National Avisa employee, a review and reclassification of all balance sheets was performed to fit budgetary records to a standard framework of analysis.

### **2.2.2.3 Survey**

Benefits were assessed through a self-reported online survey, autonomously administered by each unit and addressed to both members and unassociated donors (i.e., individuals who, even though they are not members of a BDA, go to a unit to donate blood). For the former group, the link to access the survey has been sent through email to all members for whom an email address was available. To further reinforce coverage, blood donors who visited the units in the period during which the survey was active were further solicited to complete it by appointed staff members. For the latter group, since BDAs do not retain contact information, only the second approach has been adopted.

The survey was open between March and July 2016 and divided into two main sections. The first section focused on the profiles of the respondents, the frequency and content of their donation/volunteering activity; the second on their perceptions of any perceived variation, for each area of impact, in terms of experienced change and relative attribution effect (a building block of the SROI method, representing the share of change that respondents ascribe to the fact they are BDA members or, conversely, unassociated blood donors). The second section also asked respondents about the indirect costs they incurred to engage in giving (i.e. travel costs, and the opportunity cost of the time spent donating/volunteering). All questions in the survey related to the donation experience in 2014, to be consistent with the research design.

#### **2.2.2.4 Ethics and data reliability**

The authors took all precautions to ensure the proper treatment of sensitive data. An Informed Consent form was included in the online survey, explaining the rationale of the research and the intended use of the gathered data. No identifying information was collected to ensure the anonymity of responses. Data were collected online through the survey platform Qualtrics and managed by the research team alone. Data were shared for publications and academic purposes only in aggregate form.

#### **2.2.3 Stage III – data analysis**

##### **2.2.3.1 Activity-based costing and assignment of a monetary value to non-monetized inputs**

Following the reclassification of balance sheets described above, for each category of inputs, both accounted costs and non-monetized inputs were considered (Nicholls et al., 2012) to estimate the full cost of service provision. Accordingly, the authors estimated the value of a set of resources as:

- Contributions in kind and/or advertising, referring to the concession of materials, equipment or public visibility occurring at no charge or at a subsidized price;
- Buildings, frequently granted for free (approximated by the rent per square meter by type of property and geographical location provided by the Real Estate Market Observatory of the Italian Revenue Agency);
- Productivity of unpaid volunteers, estimated through the adoption of a “replacement cost approach” (ILO, 2011, p. 36). The estimation referred to the hourly salary volunteers would have received according to the minimum contractual level established by the National Collective Labour Contracts, widely adopted within BDAs. Conversely, when more appropriate (e.g. for external professionals), it considered the wages recorded for the year 2014 according to the national equivalent of the European NACE coding.

##### **2.2.3.2 Application of proxies to survey results**

A monetization process was applied to establish the proper financial proxies aimed at highlighting the economic fallouts of the activities managed by Avis. After mapping

the impacts that may be deemed “material”, i.e. relevant to the perception of key informants (Nicholls et al., 2012), the researchers performed a further extensive literature review to identify some robust estimates of the economic repercussions of the activities carried out by BDAs. The research of estimates in the literature has represented a tremendous effort. The details of estimates and their sources have been left out from the paper for reasons of both length and focus, but left to the Appendix (online<sup>5</sup>), for the sake of completeness.

### 2.2.3.3 Application of SROI formula

After collecting both measures of inputs and benefits in a comparable fashion, the authors calculated the SROI ratios. The following section reports the findings for each area of impact.

## 2.3 The positive impact of AVIS on the health and wellbeing of members

This section reports the findings obtained through the survey submitted to the members of the four units included in this pilot study. A total of 1564 respondents participated in the survey: 1023 responses from Avis members (Table 2 - 5) and 43 responses from unassociated donors were deemed valid. Nearly 500 survey responses were discarded because either the questionnaires were not filled out completely or respondents declared not to be blood donors or volunteers in 2014. The samples of respondents are representative of the overall population of members of each unit, whereas for the sub-samples of unassociated donors, the population size and characteristics are unknown to BDAs, hindering any appraisal of their degree of representativeness.

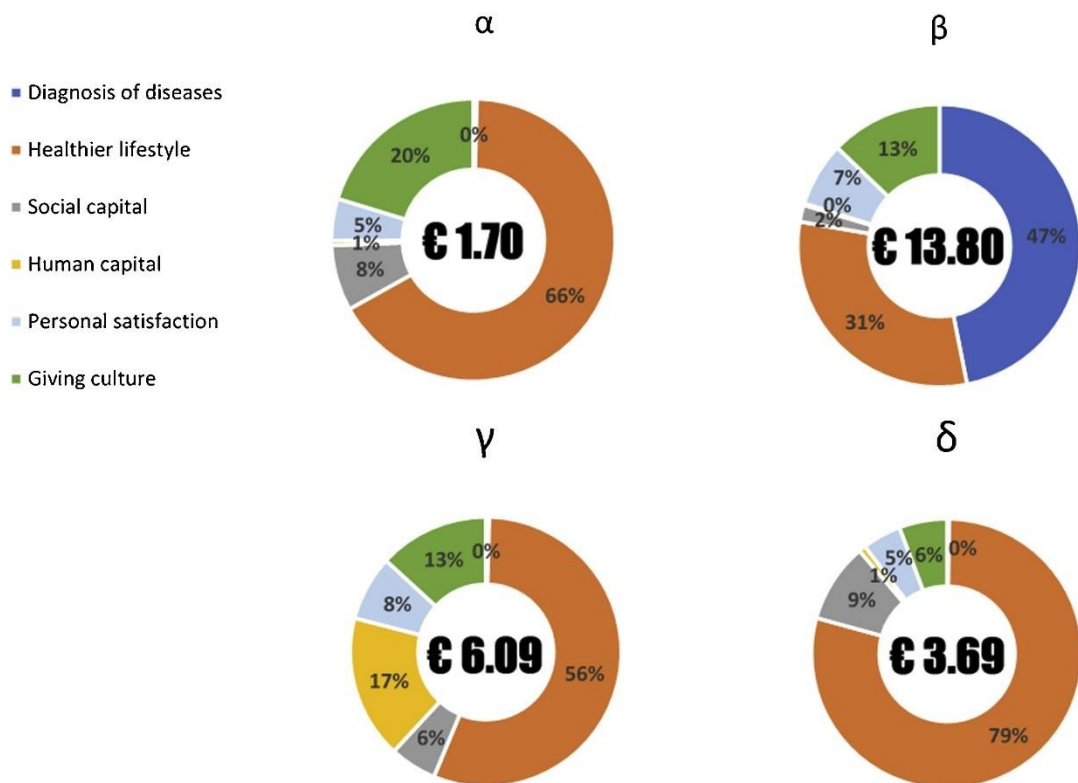
**Table 2 - 5 Size and representativeness of samples ( $\epsilon = 0.07$ )**

	$\alpha$	$\beta$	$\gamma$	$\delta$
<b>Level of confidence</b>	95%	99%	90%	95%
<b>Sample size required</b>	188	321	134	192
<b>Valid compilations by members</b>	188	469	158	208

<sup>5</sup> Available at: [1-s2.0-S0149718918301836-mmcl.docx \(live.com\)](https://www.live.com/1-s2.0-S0149718918301836-mmcl.docx)

The analysis always resulted in positive ratios (Fig. 2 - 2), varying in a range between €1.70 and €13.80. In other words, each euro invested by unit  $\alpha$  generates a value calculated as €1.70, while each euro invested by unit  $\beta$  generates a value of €13.80. Findings are reported below for each area of impact.

**Figure 2 - 2 The SROI ratios**



### 2.3.1 Area of impact 1: early diagnosis of undetected diseases

Except for unit  $\beta$ , the incidence of this area of impact is negligible. The underlying factors explaining such an outcome relate to the relatively higher dissemination among its donors of Hereditary Hemochromatosis, in line with the epidemiology of this disease, which is much more widespread in the northern areas of Italy and Europe (Velati et al., 2003).

### 2.3.2 Area of impact 2: adoption of a healthier lifestyle

By far the most significant area of impact is in the ability to solicit the adoption of a healthier lifestyle or, conversely, the abandonment of detrimental behaviors. Benefits may be divided into six sub-areas (Table 2 - 6).

**Table 2 - 6 Adoption of a healthier lifestyle**

	<b>Mean – BDA members (n = 1023)</b>	<b>Mean - Unassociated donors (n = 43)</b>
<b>Nutrition</b>		
<b>Individuals who would have needed support from a specialist</b>	7,10%	11,70%
<b>Per capita prevented need for visits</b>	3,0	2,3
<b>Attribution effect</b>	56,80%	45,50%
<b>Physical activity</b>		
<b>Individuals</b>		
<b>who increased physical activity</b>	26,20%	16,40%
<b>over 40 who increased physical activity</b>	18,40%	9,00%
<b>over 40 who improved BMI or level of physical activity</b>	8,90%	4,20%
<b>Attribution effect</b>	29,20%	26,70%
<b>Smoking</b>		
<b>Incidence of smokers (past and present)</b>	42,30%	50,70%
<b>Individuals</b>		
<b>who reduced smoking</b>	6,30%	10,00%
<b>who quit smoking</b>	24,00%	21,60%
<b>Attribution effect</b>	24,70%	26,50%
<b>Substance consumption</b>		



<b>Individuals who quit substance consumption</b>	4,90%	11,80%
<b>Attribution effect</b>	35,00%	49,20%
<b>Sexual behavior at risk</b>		
<b>Individuals who have abandoned risky behaviors</b>	78,20%	88,10%
<b>Attribution effect</b>	38,10%	41,50%
<b>Alcohol consumption</b>		
<b>Individuals</b>		
<b>who reduced consumption</b>	21,20%	16,00%
<b>with previous habitually excessive consumption</b>	4,10%	2,80%
<b>who quit habitually excessive consumption</b>	1,30%	0,00%
<b>Attribution effect</b>	37,10%	38,70%

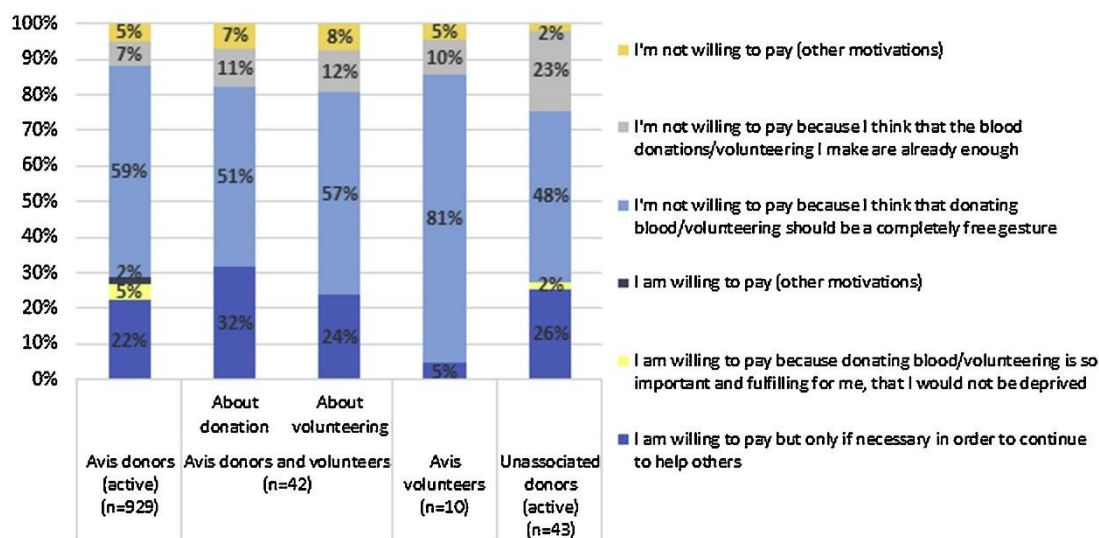
These benefits can be grouped into three blocks, according to the average level of adoption of healthy behaviors and attribution effect respectively reported by the two sub-samples. The first block includes improved nutrition and increased physical activity: BDA members show a wider adoption of healthy behaviors compared to unassociated donors. Also, being a BDA member seems to play a greater role in the modification of their behaviors compared to the changes that unassociated donors ascribe to simply being blood donors. The second includes smoking, drug consumption and risky sexual behavior. In this case, members present a lesser prior incidence of detrimental behaviors, but also a lower attribution of the positive change experienced to their BDA membership when compared to unassociated donors. The third block includes alcohol consumption: here, members show a wider adoption of

detrimental behaviors and are less prone to attribute any improvement to the fact that they are BDA members compared to unassociated donors.

### 2.3.3 Area of impact 3: personal satisfaction

When asked about their willingness to pay (WTP) to continue donating or volunteering, most respondents declared themselves unwilling, conceiving these acts as free by nature. A relatively larger share of unassociated donors declared themselves unwilling to pay because the blood donation they have made already represents a sufficient contribution. Moreover, 22,3% of Avis donors and 25,5% of unassociated donors declared themselves willing to pay if it is indispensable to helping a needy person. The respondents who emphasized the sense of fulfillment derived from these gestures represented a small proportion, though it was relatively higher among Avis donors (Fig. 2 - 3).

**Figure 2 - 3 Respondents who are willing or unwilling to pay to donate or volunteer**



Moreover, to express in monetary terms the value indirectly attributed to blood donation, the average WTP – complemented by the travel expenses incurred by individuals who go to donate and by the opportunity cost of the time they devote to donation – returns figures of €17.85 and €17.76, respectively, for donors who are associated or unassociated (Table 2 - 7).

**Table 2 - 7 The value attributed to giving**

	<b>Mean – BDA active donors (n = 929)</b>	<b>Mean – Unassociated donors (n = 43)</b>
<b>WTP of those who are willing to pay</b>	€ 15,65	€ 13,96
<b>WTP (average)</b>	€ 4,19	€ 3,37
<b>Value attributed to the experience</b>	€ 17,85	€ 17,76

#### **2.3.4 Area of impact 4: social capital**

In focusing on the crucial function carried out by BDAs in promoting a higher level of social cohesion within the community, data shows a clear distinction between members and unassociated donors. For the former group, the frequency and intensity of participation in social gatherings and the opportunity to establish relevant and durable relationships during the donation experience represent a significant effect (Table 2 - 8).

**Table 2 - 8 Social capital**

	Mean – BDA members (n = 1023)	Mean – Unassociated donors (n = 43)
<b>Individuals who attended social gatherings</b>	14,4%	0,0%
<b>Per capita annual events attended</b>	3	0
<b>Per capita annual hour dedicated</b>	10,1	0
<b>Individuals who established relationships</b>	30,0%	12,8%
<b>Per capita relationships established</b>	5,1	0,4
<b>Per capita weekly hours dedicated</b>	4,8	0,5

### **2.3.5 Area of impact 5: human capital**

Equally relevant are the impacts generated through the provision of training initiatives aimed at promoting the professional and personal growth of volunteers (Table 2 - 9). Although the average share of volunteers engaged in similar activities is about 43%, most of them recognize that this experience not only enhances their knowledge and skills, but also plays a role in their attempts to obtain their current job (respectively an average of 68% and 60%).

**Table 2 - 9 Human capital**

	<b>Mean – BDA volunteers (n = 52)</b>
<b>Volunteers who declared that</b>	
<b>they attended trainings and formative courses</b>	43%
<b>the experience increased their level of knowledge</b>	68%
<b>the experience facilitated the obtainment of their job</b>	60%
<b>Attribution effect - job obtainment</b>	41%
<b>Attribution effect - salary increase</b>	9%

### **2.3.6 Area of impact 6: reinforcement of a ‘giving culture’**

Finally, Avis members show a higher propensity to give or to further volunteer to the benefit of other NPOs (Table 2 - 10). Respondents declare that the previous experience significantly explains (32%) the fact that they engaged as volunteers for other NPOs, and their monetary giving in favor of other charities (23%). Conversely, unassociated donors mainly recognize (31%) the effect of their blood donation experience as a cause of their inclination to give money to NPOs, whereas they scarcely attribute (9%) their act of volunteering to the fact that they are blood donors.

**Table 2 - 10 Reinforcement of a ‘giving culture’**

	Mean – BDA members (n = 1023)	Mean – Unassociated donors (n = 43)
<b>Individuals who</b>		
<b>give money to other NPOs</b>	27%	29%
<b>volunteer within other NPOs</b>	15%	4%
<b>Attribution effect (monetary giving)</b>	23%	32%
<b>Attribution effect (volunteering)</b>	32%	9%
<b>Average annual donations (€)</b>	167.80	165.17
<b>Per capital annual hours spent in volunteering</b>	196	88

## **2.4 Discussion and lessons learned**

Based on the study findings, this section discusses the contributions to the advancement of knowledge and give suggestions for further research. Moreover, it outlines the managerial and policy implications of the study and discloses its limitations and lessons learned.

### **2.4.1 Contribution to knowledge and research development**

This study responds to the research question by underlining the role of BDAs in generating beneficial social and health impacts for their members. This opens up a multifaceted advancement of the extant knowledge and research.

First, although the benefits pursued through blood donation have previously been analyzed and reported (Bednall et al., 2013; Ferguson, 2015; Gillespie & Hillyer, 2002; Masser et al., 2008), this study sought to quantify them by calculating the actual socio-economic value of BDAs’ activities. This can contribute to the health

economics literature, too often focused on specific aspects of the blood supply chain (Fischinger et al., 2010; Sarov et al., 2007) neglecting the assessment of the overall blood donation experience and the role played by BDAs in the generation of value to the benefit of their members.

Second, findings enrich the literature on blood donors' motivating factors (Alfieri et al., 2016; Bani & Strepparava, 2011; Evans & Ferguson, 2014; Guiddi et al., 2015; Nilsson Sojka & Sojka, 2003). Indeed, the study goes well beyond an exclusive assessment of the "hard" impacts of blood donation (the health-related ones), which typically are "easier to measure or subject to more established means of measurement" (Nicholls et al., 2012, p. 34). Conversely, it develops fresh scientific knowledge by collecting primary data to appraise, also in economic terms, the magnitude of the "soft" impacts related to blood donation and volunteering, for which a well-established evidence base is still missing. Therefore, it sheds light on substantial although frequently neglected socio-economic repercussions accruing from the activities performed by BDAs (such as the creation of social and human capital or the reinforcement of a 'giving culture').

Third, the findings add further insights to the study of the strategic management of the BDAs' relationship with their members by making an original contribution to the body of literature, thus deepening the range of recruitment and retention strategies adoptable by BCAs and BDAs (Chliaoutakis et al., 1994; Hinrichs et al., 2008).

Evidence, in this respect, gives the opportunity to generalize these findings to a wider array of NPOs operating with similar organizational models and based on a sound contribution of volunteering work, although not necessarily strictly operating in the health sector. While these benefits are often intuitively recognized, the engagement in SIE allows NPOs to lead the managerial, cultural and political debate around their interventions to a higher level of sophistication and legitimacy.

From a methodological standpoint, this study fills a gap in the use of SROI. To date, a rather poor dissemination of SROI analyses is noticeable in the healthcare sector (Banke-Thomas et al., 2015; Millar & Hall, 2013) and even poorer in relation to the Italian nonprofit sector. The innovative nature of this study lies in the adoption of this methodology to investigate hitherto little-explored interventions. This is even

more relevant if we consider the significant lack of SROI or CBA analyses explicitly designed to assess the impact of BDAs' activities.

Furthermore, the methodology applied has confirmed its ability to provide fruitful analyses of costs and benefits, while strongly fostering the involvement of stakeholders in such processes (Arvidson et al., 2010, 2013; Simsa et al., 2014). This result adds to the literature on SIE, where stakeholder engagement in evaluation practices is a highly debated topic in scientific and political contexts.

#### **2.4.2 Managerial and policy implications**

The study confirms the claims of a vast prior body of literature on SIE (Harlock, 2013; Maier et al., 2015; Millar & Hall, 2013) which has argued that one of the main advantages of SROI is its remarkable suitability to feed organizational learning purposes, coupled with effectiveness as a reporting tool. Indeed, the present analysis allowed identification of the strengths and weaknesses of BDAs' organizational models, while prompting the implementation of the corrective actions, which are possibly required to maximize their capacity to generate positive impacts.

On the one hand, the present findings enable recognition of the domains where BDAs should strengthen their interventions – smoking, drug consumption, risky sexual behaviors and, above all, alcohol consumption – in order to play a more significant role among all the alternative factors that can induce individuals to adopt healthier behavioral models. In this instance, SIE can substantially enhance the effectiveness of BDAs' recruiting and retention strategies, allowing to systematically track the results achieved – annually and, potentially, over time – in each area of impact and to refine the actions implemented accordingly.

On the other hand, this SROI analysis also supports the accountability efforts made by BDAs to properly communicate how they provide incremental positive impacts to their stakeholders (i.e. the generation of social and human capital, or the reinforcement of a 'giving culture'). Furthermore, the analysis provides preliminary evidence supporting the hypothesis that the resources invested to finance BDAs' operations contribute to the generation of a considerable social value. The ratios systematically assumed a positive (variable) value. In other words, at least at first



glance, BDAs' interventions appear to be deserving of financial and material support because they generate positive impacts for their members, and are therefore desirable from the perspective of the public funder. Although this pilot research engaged a small sample of units, the robustness of the results and the plausibility of their variability find a benchmark in the prior study by Banke-Thomas et al. (2015).

### **2.4.3 Limitations**

Despite the study contributes to the development of the literature, some limitations affect the generalizability of its findings.

First, an annual retrospective SROI was calculated, thus avoiding assumptions and forecasts about the "drop-off effect" affecting impacts (Nicholls et al., 2012). However, the effect of this limitation was partially softened by the use of proxies representing life-time costs: this approach led to the need for a traceability system (compatible with anonymity requirements) in order to avoid the overestimation of impacts due to a "double counting" of the same benefit for the same respondent (Nicholls et al., 2012).

Second, the engagement of a restricted pool of units partially undermines the generalizability of the evidence gathered, and suggests the need for a perspective extension of the sample. However, the application of this analytical framework to different organizational models may have a detrimental effect on data collection: in fact, the activities considered for the SROI analysis are often managed by several BDAs at the municipal level that interface with a single unit only in charge of blood collection. This creates a need to retrieve information dispersed across a multiplicity of organizations, making data collection a lot more burdensome while enabling a comparative analysis with publicly-run agencies.

Third, the survey only reached a limited sample of unassociated donors. An enlargement of this control group would allow a more rigorous isolation of the impacts directly attributable to membership in BDAs. This limit, often identified as a major weakness of SROI analyses (Banke-Thomas et al., 2015), might be overcome through the inclusion in the sample of publicly-run BCAs, where they are much more likely to go to donate.

Fourth, although the sampling strategy adopted allowed detecting and discussing some geographic variations in impacts, we did not attempt to derive individual-level SROI ratios based on some key characteristics of study participants (i.e., age, gender, degree of loyalty, etc.). Indeed, without more fine-grained cost analyses, this would have required overly crude assumptions about the average annual costs incurred to manage members with different profiles. In other words, such processing of data would have only reflected potential group-level deviations in experienced impacts, without allowing an assessment of the cost-effectiveness of the actions addressed to various internal sub-groups.

Finally, despite the positive steps taken in quantifying “soft impacts”, approaches that stand out for assigning financial values to intrinsic ones – as in this case – have been the focus of much controversies (Arvidson et al., 2013). Metrics focused on the average price that would have been paid to access, for instance, opportunities for socializing, knowledge-building or engaging in prosocial behaviors may embody a too limited conceptualization of “socially provided goods”: those which cannot be produced and consumed except under social interaction (Sacco et al., 2006). Conceiving reciprocity-based transactions merely as price-based market exchanges can easily result in overlooking the non-instrumental component inherent to such forms of human relations. Furthermore, we risk losing sight of other substantial implications thereof (Sacco et al., 2006), unfolding both at the individual level (i.e., the role that certain experiences actually play in determining the social identity and subjective well-being of a *given* individual) or at an aggregate one (such as the potential chain effects of reciprocity practices in shaping an environment wherein norms of mutual trust, cooperative attitudes and a generalized ‘relational logic’ spread over, propagating prosociality). In sum, taken alone and without cognition of their shortcomings, such approaches risk perpetuating the forms of economic reductionism complained by Zamagni (2004).

#### **2.4.4 Lessons learned**

The effort of running such an evaluation is massive. The authors’ reflections are here translated into suggestions for follow-ups or similar research efforts in other contexts.

In primis, the stage of cost analysis often results in a fatiguing effort of adaptation of ordinary accountability to classifying expenditures according to specific purposes. Moreover, especially within small NPOs, the relative scarcity of economic and human resources allocated to SIE makes the attempt to collect all relevant data for the valorization of non-monetized inputs from scratch even less sustainable. These practical constraints usually lead to SIE conceived as a disturbing factor that diverts NPO employees from their core tasks and targets. The engagement of key stakeholders in the research idea and design is then fundamental to ensure a higher commitment during the whole process.

In secundis, the value of such evaluation effort could be amplified by complementing a SROI analysis with a comparative study on unassociated donors and, more relevant, with similar services supplied by publicly-run BCAs. This would complement the research findings allowing considerations more robust on the benefits of BDAs activities to public sector budgets too.

Finally, due to the high learning potential of SIEs in the strategic management of NPOs, a long and resource-intensive study would give its best in helping the organization's planning capacity, embedding the evaluation process into strategy since the first steps. For example, considering a preliminary SROI esteem (ex-ante, rather than ex-post) would help steering the organization towards pursuing its mission.

## **2.5 Conclusions**

Despite the various caveats set out above, the potential for replication of this study is high due to the specific nature of the selected method. SIE is expensive and extremely "resource intensive" (Maier et al., 2015, p. 1820), but the learnings from such an analysis can be extremely valuable whenever run in a rigorous way. This research aims at providing renewed impetus to the scientific discussion and the cross-fertilization of practices in the field of SIE, an issue that will further grow in salience within the academic, political and cultural debates in Italy and worldwide.

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### **Chapter 3: Understanding the experiences of those who mentor in educational settings: a systematic review of the literature and conceptual framework**

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### **3.1 Introduction**

The provision of formal mentoring in schools and higher education (HE) institutions received a boost from research demonstrating its effectiveness as a remedial strategy to tackle and prevent a number of large-scale social issues and educational challenges. Indeed, a well-established body of literature documents the impacts of such supportive relationships on the behaviors, attitudes and well-being of mentored youth. By now, it is well-known that children, adolescents and young adults, whose access to or persistence within the educational system may be at risk, benefit from mentoring in a variety of ways (Eby et al., 2008; Wheeler et al., 2010; Wood & Mayo-Wilson, 2012). Thus, not surprisingly, the number of similar site-based mentoring schemes arose rapidly in several countries. Also, concurrently, there has been diversification of program goals, mentoring structures (namely, one-to-one, group mentoring or blended) and mentor recruitment strategies (for instance, involving community volunteers, as opposed to targeting uniquely near-age peers or the employees of companies willing to promote workplace-initiated volunteering to meet their philanthropic goals).

Despite the fast growth of these formal mentoring programs, as well as of the level of diversification of their design components, knowledge on a series of issues critical to their success built at far slower pace. Indeed, while much research has examined the outcomes for those mentored, considerably less research has accounted for the perspectives of the volunteer mentors who serve within educational settings, addressing how mentoring affects them and what drives mentors' decisions to commit to and stick with a mentoring relationship (MR). Building and mastering the evidence-base concerning the triggers, outcomes, facilitators and barriers of mentors' journey is, nonetheless, of paramount importance. In fact, it would escalate mentoring professionals' effectiveness in promoting long-lasting, stronger and more fruitful MRs, improving the experiences for all those involved and making a step forward towards closing the mentoring gap (intended as a mismatch between the offer and demand of mentors). Prior research (Grossman & Rhodes, 2002; Spencer, 2007; Spencer et al., 2017) has documented that a substantial part of MRs comes to a premature – and frequently mentor-initiated – closure. Early-ending relationships and high mentor turnover hold the potential to make intervention delivery more

fragmented and resource-intensive, disincentivizing the investments that would be needed to maintain mentor selection, ongoing support and training at an adequate level of quality (Aresi et al., 2021). Even worse, early termination can undermine program effectiveness, as potentially harmful to the mentees (DeWit et al., 2016; Grossman & Rhodes, 2002; Grossman et al., 2012). Ultimately, if we really wish to escalate the enrolment of high-quality, consistent and committed mentors in these schemes, it is imperative to stop disregarding how mentors experience their relationships or the factors that spur them to uphold their commitment. Although the academic interest in these topics has been relatively belated and less pervasive, over the last decades it continued to gain momentum. We can now rely on a growing body of research that investigates the psycho-social processes that prompt individuals to voluntarily contribute time and effort to supporting students across a range of educational contexts, as well as the factors and practices that most increase mentors' follow-through on their commitment. Thus, the current paper systematically reviews the empirical studies that focused on mentoring in educational settings and provided evidence about: the outcomes sought after and experienced by the mentors; the negative, unintended consequences volunteer mentors may run into; and the factors that contribute to or disincentives their initial and ongoing willingness to mentor.

Firstly, the article clarifies in which ways this study adds to previous literature reviews. Secondly, it describes the methods and procedures that guided the literature search, as well as the analytic approach through which the research findings yielded by prior research have been interpreted, rearranged and graphically represented. Thirdly, study findings are discussed, with the provision of an overview of the themes that dominate the body of literature examined and of a conceptual framework that depicts the core elements of the mentoring experience as lived and recounted by mentors. Finally, key implications for mentoring practice and research are outlined.

### **3.2 Background**

Published reviews in this field are primarily concerned with the program impacts on mentored youth (e.g., Randolph & Johnson, 2008), while much rarer are those that summarize extant research into the motives, outcomes, enablers and hindrances for the volunteer mentors. Some contributions (e.g., Stukas et al., 2013; Stukas & Tanti,

2005) represent noteworthy exceptions, whose value, nonetheless, is limited by a number of drawbacks, as here elaborated.

First of all, former reviews not only often lack systematicity but are relatively dated, considering that this research area is in constant expansion. Moreover, they alternate findings from studies focused on youth school-based (SBM) and community-based (CBM) mentoring programs, or even mentoring in the workplace. As such, they fail to acknowledge how specific elements of program design and the unique context wherein mentoring occurs strongly affect the profile of mentors recruited, the outcomes accrued, or challenges encountered. As pointed out by different scholars (Herrera et al., 2000; Karcher et al., 2005; McQuillin et al., 2015; Pryce et al., 2015), participation in site-based mentoring schemes may be more attractive to categories of volunteers that would not consider CBM as an alternative. For instance, the shorter and less intensive time commitment entailed in youth SBM, combined with the constraint of meetings taking place during the regular school day, results in greater involvement of those with less spare time (e.g., corporate employees, law enforcement personnel) or, conversely, with more flexible schedules (e.g., university/college (students, retirees). Also, the greater structure, monitoring and, hence, safeguards afforded by site-based mentoring schemes, which also derives from the proximity of youth services and helping professionals within the educational system, may make them a better fit for younger mentors or those who simply deem community outings less secure from a child protection point of view. Consequently, such schemes are known to involve greater numbers of volunteers at the extremes of the age spectrum, with clear implications in terms of motives spurring individuals to get involved. Site-based mentoring schemes present specifics and unique challenges as well, such as those introduced by the restrictions imposed on mentoring activities (e.g., less varied, with timelines dictated by the academic year schedule and hosted in spaces that may lack privacy and quiet) or the wider involvement of student mentors (Herrera et al., 2008; Limeri et al., 2019; Tierney & Branch, 1992). The latter more often mentor in group settings, while interacting less frequently with mentees' parents/guardians. Also, they may be better positioned to empathize with and support peers in a similar developmental stage. However, they may struggle more to legitimize their role or reconcile it with other demanding

academic undertakings. Moreover, grappling with their own developmental needs, they may be less suited to fully invest in MRs that demand a lot, without guarantee of any returns.

Secondly, these reviews tend to cover only some of the topics of interest, mostly providing narrative syntheses. In particular, while mentors' characteristics, motives and gains or successful strategies for their recruitment or retention are discussed, the potential negative outcomes associated with the mentoring experience are usually neglected. Additionally, no prior review formulated a broader conceptual model to portray the mentoring process and the interactions among its constitutive elements, from those that enable and constrain individuals' initial engagement to those underpinning the motivation to keep mentoring over time.

This paper aims to fill these gaps and addresses the following research questions: what is known, according to extant scientific knowledge, about the motives, (positive and negative) outcomes, enablers and hindrances reported by those who mentor within educational settings? And what is the interplay among these constitutive elements of the mentor experience?

First, the functional approach to understanding volunteerism (Clary et al., 1992, 1998) will provide the primary theoretical grounding for the investigation of the outcome expectations and positive gains articulated by mentors. A central tenet on which this theory relies is that individuals may engage in voluntary activities for a variety of motives, captured in the 30-item Volunteer Functions Inventory (VFI). These include the need: to express important prosocial and humanitarian values; to gain a better understanding of the world, oneself and others or experiences and skills that can pay off in terms of career or academic development; to reinforce bonds with social reference groups; and, finally, to pursue ego development or protection. Second, rather than simply enumerating the reasons why participants volunteer and the benefits they reap, the analysis will embed an examination of the unanticipated negative outcomes and feelings possibly experienced by mentors, as well as of the barriers and facilitators that, in their view, most affected the mentoring process. Finally, the study will put forward a framework that adopts a processual perspective on mentors' experiences, thus fully revealing their complexity. This model will

portray the program theory behind such mentoring schemes, telling us how these are assumed to achieve their intended outcomes according to extant scientific knowledge.

### **3.3 Methods**

#### **3.3.1 Literature search**

The process of secondary source collection initially rested on some sources already known to the first author. Prior to engaging in the systematic search, the body of literature has been preliminarily scoped out, resorting to backward citation mining as primary retrieval method. This step, rather than striving for exhaustiveness, aimed at providing an initial understanding of potential strengths and weaknesses (e.g., evaluative approaches, scope of analysis, etc.) of located studies. Furthermore, the scarcely standardized terminology possibly used in titles and abstracts was deemed a potential concern, as able to limit the ability to create search strings sufficiently inclusive to locate all relevant publications in the chosen databases. Hence, this preliminary phase provided the foundations for a better structuring of the subsequent steps of the literature search.

Alongside this bunch of documents, in the early step, the literature search (initiated in mid-February 2020) relied on four complementary databases: Medline, APA PsycInfo, ERIC and Social Science Premium Collection. The search strings, were built to limit the scope of the review to studies, published from 1980, that focused on one or more core dimensions of the experience of volunteers within mentoring programs provided in educational settings, such as: i) motivations; ii) outcomes; iii) satisfaction and retention; iv) process mentors go through. Additional sources were located by searching the databases of two relevant journals: “Mentoring & Tutoring: Partnership in Learning” and “Children and Youth Services Review”. Overall, the literature search returned a total of 1,464 records for possible inclusion (Figure 3 - 1). The screening of titles, abstracts and (where appropriate) key sections of the main text was conducted to locate the studies to be considered for inclusion, removing those that:

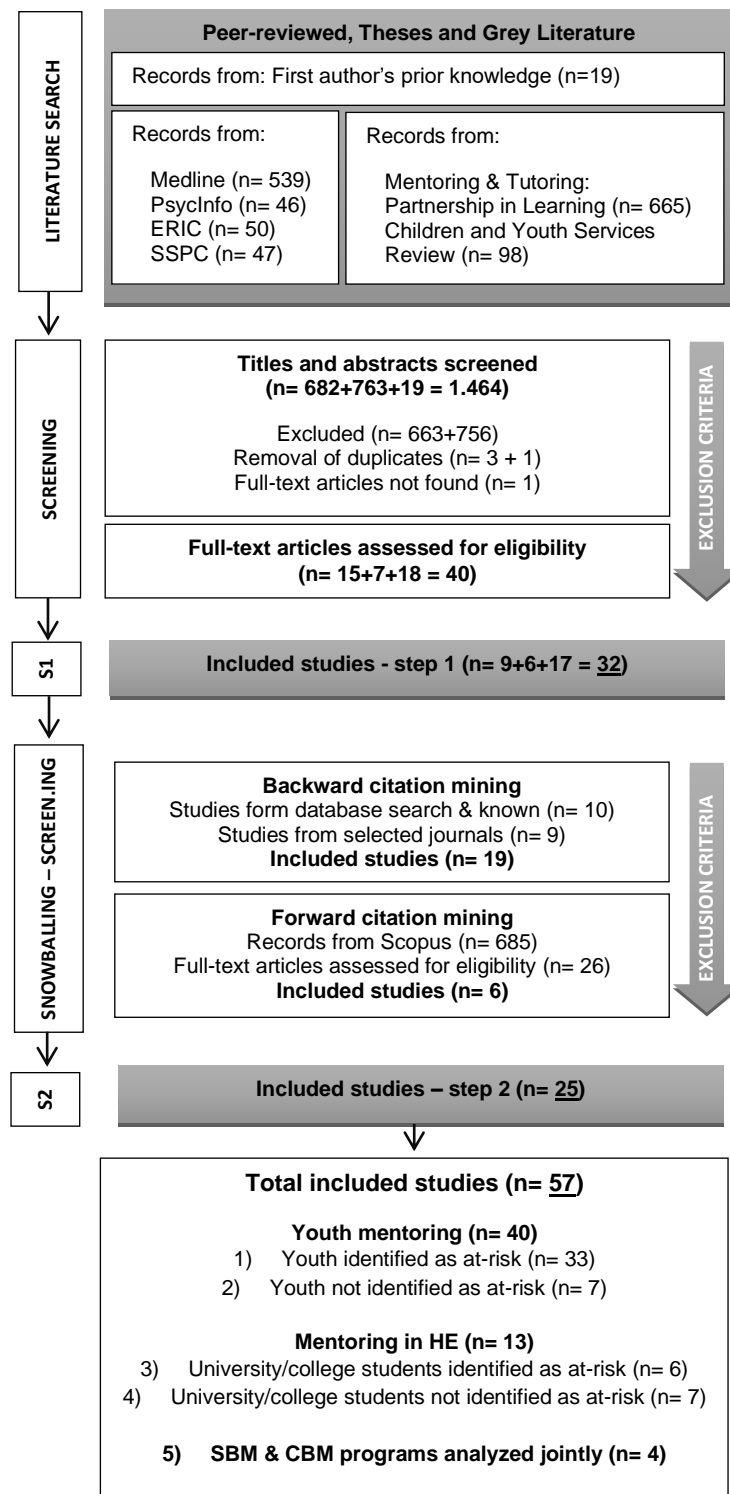
- Did not focus on mentoring in educational settings (e.g., CBM) and volunteers' experience;
- Focused on mentoring in the sport field or workplace (e.g., induction of beginning teachers);
- Focused on site-based mentoring schemes but conceived as professional training or as academic tutoring, without clarifying whether it involved the provision of psycho-social support;
- Focused on site-based mentoring schemes where mentors received financial compensation.

Once duplicates and sources for which the full text was not available online were removed, 40 papers underwent a deeper full-text screening, as potentially relevant. Such procedure revealed that a few studies met some of the exclusion criteria<sup>6</sup> described above. Hence, only 32 were included in the review. Further candidate studies were directly sourced from the screening of the reference list of previously included studies and through hand searching Scopus, to identify more recent publications that referred to included sources. After applying the same exclusion criteria, further 25 studies were added. Hence, the review (completed in mid-May 2021) focuses on 57 studies.

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<sup>6</sup> In most of the cases, the intervention was too loosely described in the abstract, making it hard to determine, without an integral reading, if the article actually dealt with a site-based mentoring scheme, moreover displaying all the features of interest.

**Figure 3 - 1 Flow chart of literature review process and results**





These have been grouped in 5 broad categories, in that they deal with: Youth mentoring, either addressed to youth identified as at-risk (n= 33) or not (n= 7); Mentoring in HE, either addressed to university/college students identified as at-risk (n= 6) or not (n= 7); SBM and CBM programs analyzed jointly (n= 4). More specifically, the review intentionally encompasses programs that:

- May be structured differently (e.g., as regards the potential use of group mentoring, blended models, co-mentoring, or the frequency/duration of meetings);
- Recruit participants across a range of youth populations (e.g., from pre-school children to university/college students, considered or not at-risk) and mentors' populations (such as, adult community members, corporate volunteers, high school or university/college students).

However, acknowledging that mentors from such different backgrounds, who deal with such a varied pool of mentees, are likely to experience mentoring in different ways, the Appendices (D-F) provide a breakdown of the most salient themes across the 5 categories, allowing cross-checking in greater detail the differences in how mentoring is experienced.

### **3.3.2 Data analysis**

A data extraction form was populated with information regarding key features of: i) the study (e.g., methodological approach, dimensions assessed); ii) program (e.g., year of inception, location, dominant goals) and mentoring model (e.g., one-to-one, frequency and minimum duration of meetings, service requirements, level of parental involvement, provision of on-site supervision); iii) participants (e.g., mentors' and mentees' gender, age, profile).

#### **3.3.2.1 Thematic analysis**

All included studies were thematically analyzed, using the computer-assisted qualitative data analysis software NVivo 12 (QSR International Pty Ltd., 2018). Theory development and refinement were conducted abductively (Dubois & Gadde, 2002). In particular, as anticipated, the initial frame that guided data analysis was grounded in a well-established theoretical perspective on individuals' helping

intentions and behaviors: the functional approach (Clary et al., 1992, 1998), which informed the conceptualization of mentors' motivations and positive outcomes. Additionally, elements from extant academic sources (Ferro, 2012; McGill et al., 2015; Stukas et al., 2009; Teye & Peaslee, 2020) were combined to form an initial frame regarding additional motives and gains or the unanticipated negative outcomes and feelings possibly experienced by mentors. Similarly, themes for processual barriers and facilitators combined elements reported by prior studies (Martin & Sifers, 2012; McGill et al., 2015; Harris & Nakkula, 2008; Rubin & Thorelli, 1984). This provisional codebook, prepopulated with themes from established theories, went through an iterative process of refinement as the coding progressed. Relevant chunks of text were grouped based on the recognition of recurrent patterns and similarity of meanings, and coded either by using the themes already enumerated in the codebook or by amending existing codes/generating new ones. Ultimately, although data analysis was approached with a set of pre-defined, theory-driven codes, several fresh concepts emerged throughout the process. The final codebook (Appendix A) illustrates both the starting and final sub-themes, organized into meaningful categories (themes), in turn ordered into larger groupings: VFI motives and positive outcomes; additional motives and positive outcomes; negative outcomes and feelings; factors (barriers and facilitators). Some illustrative quotations from qualitative studies have been reported, as well as all the sub-themes left uncovered.

### **3.3.2.2 Mapping**

Finally, the codes extracted were graphically rearranged using the software Decision Explorer 3.5.0 (Banxia Software Ltd., 2017) to produce a conceptual framework that follows a specific mapping approach: the Strategic Options Development and Analysis (SODA) methodology (Eden, 1988). The fields of application of this method have rapidly expanded, including the development of the program theory of SBM schemes (Millar, 2020), though with a focus on the experience of mentored youth. The maps are usually referred to as "directed" diagrams, in that constructs that either represent means or ends are connected via arrows indicating assumed causality: the statement at the tail of the arrow influences the statement at the arrowhead. In essence, these graphs incorporate the subjective perspectives and beliefs of individuals or groups upon a particular phenomenon.

For the purposes of this study, the concepts identified through the thematic analysis have been clustered around two distinct “heads”: higher-level, desired goals from which no outgoing arrows depart but that receive incoming arrows from the concepts located underneath (“tails”). Specifically, the clusters respectively culminate with the decision: i) to take on the mentoring role; ii) to renew one’s own commitment to mentoring. Therefore, the first cluster represents the decision-making process that led an individual to become a mentor (Figure 3 - 2), whereas the second one depicts the change process a mentor goes through during the actual volunteering experience (Figure 3 - 3).

Although Appendix B provides a printable legend of the map, it has to be noted that mentor’s motivations and positive outcomes are illustrated through squared boxes, with colors consistently representing different categories of concepts. Likewise, mentor’s negative outcomes or feelings are represented through squared boxes with a white background and red statements within. Different colors indicate whether these stemmed from within-pair dynamics or, conversely how mentoring affected other areas of a mentor’s life (e.g., work). Those concepts not framed in boxes are, instead, referred to as “factors”<sup>7</sup> and pertain to: program design or implementation; within-pair dynamics; mentor’s or mentee’s individual characteristics; mentors’ relationships taking place in a broader social ecology; other aspects. Finally, the different concepts that make up the map are connected through arrows. Solid arrows denote a relationship that has been established quantitatively, while dashed lines are used for qualitatively evidenced connections. The symbol “-” is added to indicate that the influence exerted by the “tail” is negative. Pink arrows point to those elements that intervene to interrupt a chain of events and can be simply read as a “*but*”. Solid green arrows indicate a bi-directional causal link. Dark blue arrows connect elements that are part of a mediation model. Light blue arrows indicate that the influence of the “tail” is both positive and negative.

A key advantage of the approach is that the broad structure of the map can be explored through visual inspection and/or computer-assisted analyses, discovering a number of interesting features (Eden et al., 1992). For example, either by identifying

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<sup>7</sup> All the elements that allow (facilitators) or hinder (barriers) the occurrence of a positive outcome or that allow (barriers) or hinder (facilitators) the occurrence of a negative outcome.

the areas with a greater density of links or by calculating the overall number of arrows entering or exiting a construct (domain analysis), it is possible to detect the constructs that affect and are affected by the greatest number of other elements. In sum, these maps provide incredibly powerful tools for better understanding when and how to intervene to direct the process toward desirable outcomes.

For ease of reading, the figures here presented provide a simplified version of the framework (while the extended one is provided in Appendix B). As regards motives and outcomes, only higher-level themes are depicted, rather than distinct sub-themes. For the factors, only those among the 10 most interlinked concepts – as revealed by the domain analysis performed – have been included.

### **3.4 Results**

Among the 57 included studies (Appendix C for fuller information), 50% relied on quantitative, 29% on qualitative and 21% on mixed research methods. Only two (Dolan & Johnson, 2009; Schmidt et al., 2004) purposely accounted for all four dimensions of interest (i.e., motivations, positive and negative outcomes, factors). Similarly, exclusively two studies (McGill et al., 2015; McGill, 2012) were characterized by a processual perspective on the issue. It is also worth noting that most of the schemes featured in the studies were implemented in the USA (72%). When their year of inception was specified, it primarily fell between 1995-2004 (12%) or 2005-2014 (12%), with only 3% of schemes initiated before 1995. There was great variability across the schemes in terms of key programmatic features. However, most of them pursued instrumental goals (36%) and entailed weekly (43%) one-to-one (33%) mentoring meetings, which usually are expected to develop over at least one academic year (40%). Also, 38% of the schemes offer on-site supervision and only 9% of them entail substantial/structured interactions with mentees' parents/guardians. As regards the gender and age makeup of the pool of mentors, in about 70% of the cases mentors were mainly females and under 40 (as 50% of the programs relied exclusively on university/college students and 12% on high schoolers). Mentored youth are, most of the times (62%), identified as at-risk. The populations more frequently targeted are pupils respectively enrolled in: high school (21%), middle school (19%) and elementary school (17%).

### 3.4.1 Motivations and Positive Outcomes

As illustrated in Table 3 - 1, three motivational or outcome domains belonging to the VFI are overwhelmingly those most frequently reported by extant literature: “Understanding” (87 occurrences); “Enhancement” (79) and “Career” (66). Interestingly, the “Values” domain – usually considered the sole purely altruistic and other-oriented within the VFI – is considerably less prominent (37) and, unlike the previous themes, primarily acts as a motivating factor.

As regards the individual items comprised in the three aforementioned dominant themes, the analysis indicates that the most recurrent positive outcome experienced by mentors consists of learning things through direct, hands-on experience (cited by 36% of the studies). The domain analysis reported at Table 3 - 3 also highlights that this is the tenth most central concept within the conceptual framework, with a roughly even number of arrows pointing to and originating from it. The item in second place (34%) refers to the sense of fulfilment, satisfaction, reward or enjoyment mentors derive from mentoring. Immediately after, we find the following outcomes: gaining a new perspective on things or overcoming some preconceptions (29%); establishing friendships (29%); becoming more self-aware and learning about one’s own strengths and weaknesses (25%); developing or confirming the interest in pursuing a certain career path (23%); reinforcing foundational knowledge and basic skills (21%); learning more about positive youth development (PYD) or the target group (18%). The analysis also reveals that, as opposed to all the other sub-themes, the personal gratification stemming out of volunteering is cited by a relevant number of studies (14%) as a key reason why study participants decided to mentor. The fact that, by contrast, the others are primarily reported as outcomes may suggest that they are generally experienced as unanticipated benefits. Finally, in terms of relative salience of themes to specific categories of mentoring schemes (Appendix D), it was found that while the theme “Values” somewhat spans across categories, the themes “Understanding” and “Enhancement” are disproportionately more prominent within programs addressed to at-risk mentees. Also, career-related motives and outcomes are especially salient within programs that recruit university/college student mentors. Instead, volunteers who reported that what they learned by mentoring benefitted other private relationships always mentored at-risk young people.

**Table 3 - 1 Incidence of selected themes and sub-themes (Motivations and Positive Outcomes)**

Themes	Selected sub-themes	% of sources discussing each sub-theme		N. of times each theme is discussed		
		As a motive	As an outcome	As a motive	As an outcome	Total
<b>Values</b>		-	-	25	12	<b>37</b>
<b>Understanding</b>	Learn about PYD <sup>8</sup> or target group	2%	18%	15	72	<b>87</b>
	Gain new perspectives	5%	29%			
	Learn through experience	7%	36%			
	Become more self-aware	4%	25%			
<b>Enhancement</b>	Enhance self-esteem	4%	32%	18	61	<b>79</b>
	Feel good	14%	34%			
	Make new friends	5%	29%			
<b>Career</b>	Reinforce foundational knowledge	5%	21%	15	51	<b>66</b>
	Career clarification	5%	23%			
<b>Civic concern</b>	Give back	14%	9%	12	21	<b>33</b>
	Civic responsibility	2%	16%			
<b>Attachment</b>		-	-	3	14	<b>17</b>
<b>Sensitizing experiences</b>		-	-	12	2	<b>14</b>

<sup>8</sup> PYD = Positive Youth Development

The analysis detected three emergent themes that fall beyond the traditional VFI and are relatively widespread. Firstly, the theme “Civic concern”, which refers to a sense of obligation to the community (33 occurrences). Recurrent sub-themes within this domain are: the development of a sense of civic responsibility and a more positive attitude toward community service (more frequently reported as an outcome), followed by giving back and contributing to the community (which primarily appears as a motivation and especially in SBM programs addressed at at-risk young people). Secondly, the theme “Attachment” (17), indicating a sense of belongingness to the mentoring group, organization/program, school/university/college or the local community. Finally, there is the theme that holds together all those “Sensitizing experiences” (14) that make an individual more sympathetic toward the specific social issue tackled or better prepared to mentor. These items almost exclusively act as motivating factors and are particularly reported in studies focused on university/college student mentors. Interestingly, while the first novel theme is surely other-oriented, the last one actually lacks a self-centered connotation, as it primarily captures antecedent conditions that fuel the individual altruistic desire to help someone. By merging the altruistic themes “Values”, “Civic concern” and “Sensitizing experiences”, the resulting higher-level category would become the second most recurrent domain (with 84 occurrences), outranked only by “Understanding”.

### **3.4.2 Negative Outcomes and Feelings**

The negative unintended consequences potentially incurred by mentors turn out to be discussed pretty often: while only six studies explicitly examine this dimension of mentors’ experience, overall, 23 of them report findings in this respect (Appendix E). The most frequently occurring theme relates to negative feelings associated with within-pair dynamics, which comprises three overriding sub-themes. These appear as clusters of adverse emotional states, such as:

- Discouragement, demoralization, disheartenment, sadness, frustration, emotional drain (cited by 18% of the studies and fourth most interlinked concept within the map – Table 3 - 3);

- Feeling tested, torn, conflicted, confused, unprepared, lost, overwhelmed, shocked (16%);
- Hesitation, insecurity, discomfort, fear, apprehension, worry, concern (14%).

Such feelings often make their appearance in studies focused on youth SBM programs addressed to at-risk beneficiaries. In contrast, “extra-pair” negative feelings or outcomes – that unfold in other areas of the mentors’ lives (e.g., professional or academic performance) – mostly characterize programs offered in HE institutions.

### **3.4.3 Barriers and Facilitators**

Given the high number of factors identified, only those that are both highly discussed in the body of literature analyzed and highly influential within the map (Table 3 - 2) will be illustrated, providing a concise evidence synthesis (while Appendix F offers a complete picture).

The fact that the “Mentor had (prior) positive/negative experiences or saw/did not see the change” turned out to be the second most interlinked concept in the map. Also, it is mainly a point of departure of outbound arrows, which signals the ability of this factor to influence a wide number (19) of aspects of mentor experience. Table 3 - 2 further shows that this influence is exerted both as a potential barrier (11% of studies) and as a facilitator (20%). In this respect, a number of sources discuss how the inability of mentors to see the desired improvements in their protégés (often primary reason for becoming mentors) is frequently experienced negatively (Marshall et al., 2021; Strapp et al., 2014). Also, this can bring up a series of negative emotions, such as fear and concern of getting involved in mentoring (Slaughter-Defoe & English-Clarke, 2010) or frustration (Karcher & Lindwall, 2003; Limeri et al., 2019). Conversely, extant studies extensively evidence that seeing the desired results is overwhelmingly related with self-enhancement outcomes for the mentors, in the form of a sense of reward, gratification, achievement and pride or greater confidence in themselves (Limeri et al., 2019; Monk et al., 2014; Raven, 2015; Tracey et al., 2014).

Ranked third in the domain analysis, we find whether or not the mentor receives adequate supervision and staff support which, similarly, has primarily exiting arrows



and is exclusively discussed (23% of the studies) in its facilitating role. Many (Caldarella et al., 2009; McGill, 2012; Weiler et al., 2013) outlined how critical this supervisory function is to make mentors feel better able to problem-solve or manage effectively crisis situations, strengthening feelings of self-efficacy. It also fosters the ongoing growth of mentors, who derived from this a number of positive outcomes that ranged from building key competencies (such as, teamwork and support-seeking skills), to enhancements in self-awareness or self-esteem, from improving the ability to handle mentees' unrealistic expectations, to feeling more connected to the school/university/college or the program.

The sixth most influential concept within the map is mentors' sense of self-efficacy (i.e., trust in one's own ability to maintain a successful relationship), which has an even number of incoming and outgoing arrows (equal number of elements that affect it or are influenced by it). In particular, the influence exerted over other process elements is slightly more often negative (13% of studies). A number of sources (Banks, 2010; Dolan & Johnson, 2009; Limeri et al., 2019; McGill, 2012) describe the set of circumstances that can undermine mentors' confidence, to the extent that the very intention to initiate or continue mentoring may be compromised. These, for instance, include: the presence of cultural or language barriers, lacking patience or control over what the mentee is going through, feeling not equipped to handle challenging situations or convey knowledge, conflicting mentoring styles among potential co-mentors.

The next concept in terms of linkages is mentee's issues (e.g., attitudinal, behavioural, mental health, emotional, etc.), which exclusively has outgoing links, thus turning out to be a highly influential factor on other aspects of mentor experience. Interestingly, it equally acts as a barrier (14% of studies) and as a facilitator (13%). A number of studies (Hughes et al., 2012; Limeri et al., 2019; Meltzer & Saunders, 2020; Tracey et al., 2014) highlight that the mentors confronted with mentees' serious personal problems may not only perceive these as a major barrier, but also feel uncomfortable or unprepared to assist the young people, frustrated or even upset. If overly empathetic, mentors may even be subject to vicarious stress and anxiety. Experiencing such a wide range of negative emotions can, ultimately, lead mentors to disengage from the MR. In contrast, it was found

(Hughes et al., 2009, 2010; McGill, 2012; Weiler et al., 2013) that the challenging life circumstances of some mentees may push mentors to become more self-aware, sensitive to others' differing experiences, or able to be sympathetic and compassionate. Mentors may also dispel some preconceptions and stereotypes about disadvantaged youth, becoming more aware of a number of issues facing their local community and more actively involved in combating social injustices.

The eighth concept is mentor satisfaction with the MR or overall experience. Interestingly, more is known about its antecedents than consequences (mainly incoming arrows). Nonetheless, it is always configured as an enabling factor (11%), particularly in predicting relationship duration (Siem & Stürmer, 2012), mentor commitment to the MR (Drew, 2018; Gettings & Wilson, 2014), or mentor intentions to continue in the future (Aresi et al., 2021; McQuillin et al., 2015).

Finally, in the ninth position, there are potential differences with the mentee (e.g., cultural background, language, age, personality or interests). This factor has exclusively outgoing arrows (highly influential) and, like mentee's issues, play often a dual role, acting both as a barrier (21% of studies) and a facilitator (14%). Prior studies (Limeri et al., 2019; McGill et al., 2015; Slaughter-Defoe & English-Clarke, 2010) suggest that mentors, prior to embarking in the relationship, may have worries that the mentee may struggle to feel comfortable with them or that navigating these differences can overwhelm themselves. Conversely, in other cases (Jackling & McDowall, 2008; McGill et al., 2015; Meltzer & Saunders, 2020; O'Shea et al., 2013), interactions between highly different individuals benefitted mentors, often translating into greater openness to new perspectives and differing viewpoints (diversity skills), listening abilities, and debunking stereotypes. Ultimately, extant evidence partially suggests that mentors who lack the instruments to bridge these diversities may face greater struggles and even choose to give up on the mentoring role. Conversely, others believed that being part of matches with substantial within-pair differences fostered their personal growth.

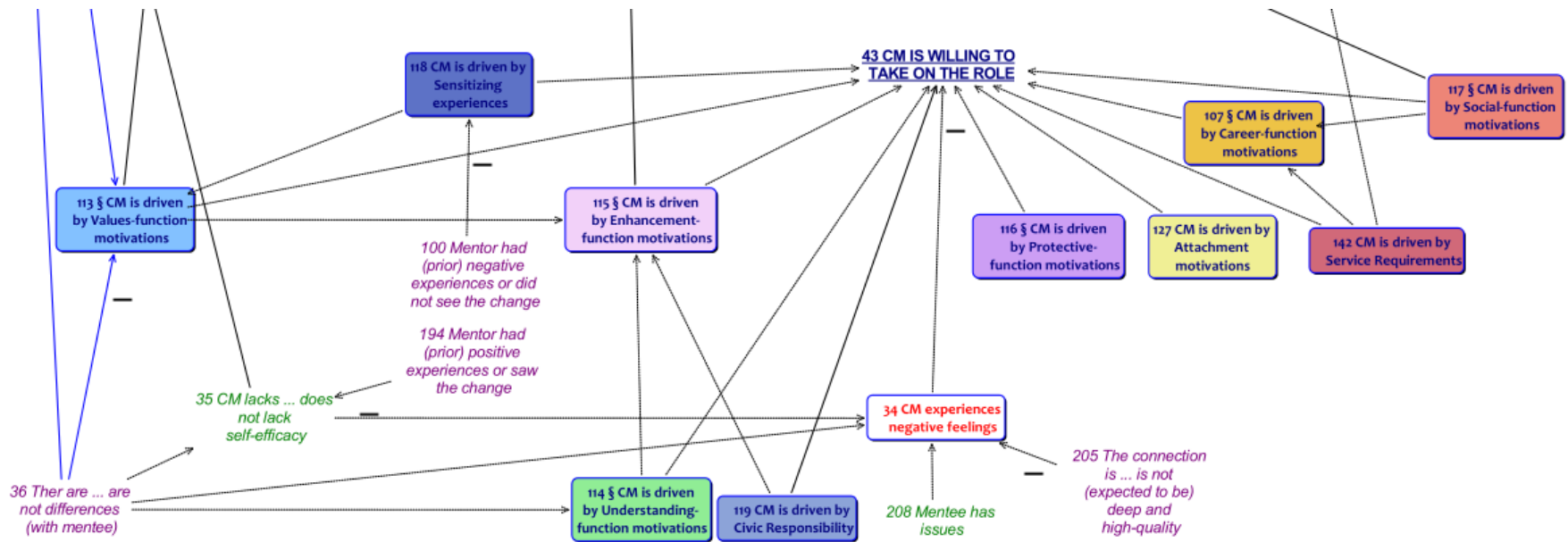
**Table 3 - 2 Incidence of selected themes and sub-themes (Barriers and Facilitators)**

Theme	Sub-theme	% of sources discussing each sub-theme		Ranking domain analysis
		As a barrier	As a facilitator	
<b>Programmatic</b>	Mentor receives adequate/inadequate supervision & staff support	0%	23%	3
<b>Relational</b>	There are/are not differences (with mentee)	21%	14%	9
	Mentor had (prior) positive/negative exp. or saw/did not see the change	11%	20%	2
<b>Individual</b>	Mentee has issues	14%	13%	7
	Candidate Mentor/Mentor lacks/does not lack self-efficacy	13%	9%	6
	Mentor is satisfied with MR/experience	0%	11%	8

#### **3.4.4 Conceptual Framework**

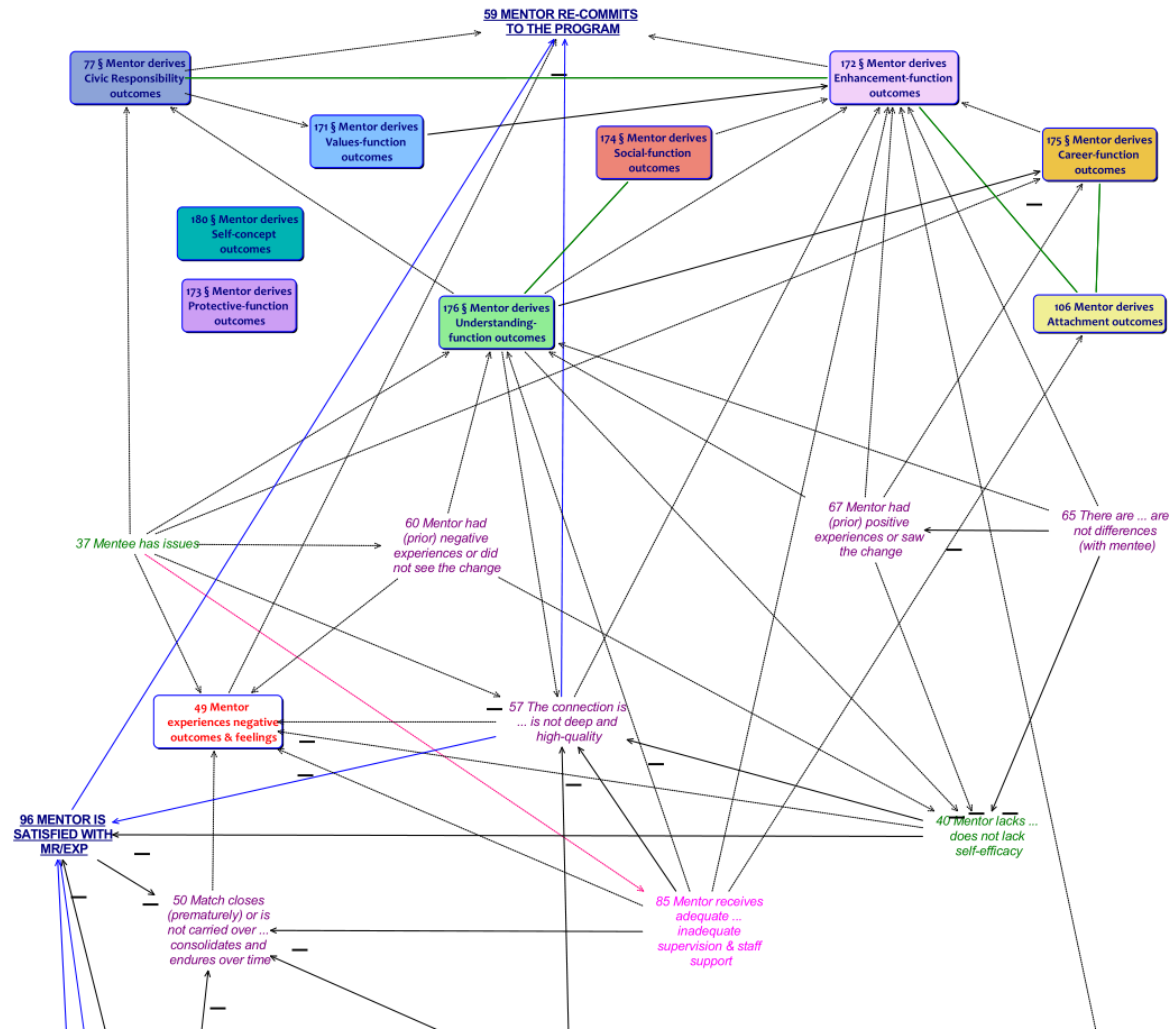
This concluding paragraph comments on the broad structural properties of the conceptual framework put forward, which further enhances our comprehension not only of the mentoring process experienced by volunteers, but also of the body of literature that explored this topic so far. Unlike the tabular summaries, the visual representation conveys in a glance how varied, complex and intricate the mechanisms at work are, from the earliest stages of mentors' involvement until the decision to renew their commitment. A noteworthy feature of the framework – especially when considering its extended version (Appendix B) – is that only a few arrows bridge the two sub-clusters: the process of initial engagement (Figure 3 - 2), and the actual volunteering experience (Figure 3 - 3). This is somewhat informative about the struggles (or reluctance) of empirical studies to investigate the connections between what happens prior to engaging in mentoring and the ensuing experience.

Figure 3 - 2 Decision to take on the role<sup>9</sup>



<sup>9</sup> CM = Candidate Mentor

Figure 3 - 3 Decision to re-commit



Furthermore, the domain analysis performed (Table 3 - 3) returns a further, valuable observation: by looking at the number of arrows around concepts, it clearly shows in which cases our understanding of the consequences of an element is still narrow (e.g., match closure, mentor satisfaction), possibly calling for further explorations.

**Table 3 - 3 Domain analysis of conceptual framework**

		Ins	Outs	Tot
1	Connection is/is not deep and high-quality	<b>17</b>	7	24
2	Mentor had (prior) positive/negative experiences or saw/did not see the change	4	<b>19</b>	23
3	Mentor receives adequate/inadequate supervision & staff support	6	<b>16</b>	22
4	Mentor feels discouraged, demoralized, disheartened, sad, frustrated ...	<b>17</b>	1	18
5	Match closes (prematurely) or is not carried over	<b>15</b>	3	18
6	Candidate Mentor/Mentor lacks/does not lack self-efficacy	9	9	18
7	Mentee has issues	0	<b>17</b>	17
8	Mentor is satisfied with MR/experience	<b>13</b>	4	17
9	There are/are not differences (with mentee)	0	<b>17</b>	17
10	Mentor learns things through direct, hands-on experience	9	6	16

Finally, the map highlights which concepts are directly connected with the individual decision to uphold the commitment made as a mentor over time. In the extended conceptual framework (Appendix B), 13 links point to this “head” of the map, of which four are negative (namely, open conflicts with mentee, experiencing negative outcomes or feelings, weak commitment from organizational leaders, time commitment perceived as excessive), and nine are positive (e.g., gaining benefits that are unanticipated or outweigh indirect costs). Only three of these latter associations have been established through sound quantitative analyses. In particular, Aresi et al. (2021) found that mentor satisfaction with the MR partially mediated the positive association between relationship closeness and intentions to stay. Similarly,

McQuillin et al. (2015) report that mentors more satisfied and fulfilled with their MR intend to mentor longer, and that ongoing – rather than one-time – training yields superior results regarding mentors’ reported plans to continue.

### **3.4 Discussion**

We now discuss the main managerial implications of these findings, as well as the contributions made to the advancement of knowledge in this research field. Next, the main drawbacks of the analysis are discussed, while highlighting some promising directions for forthcoming studies.

#### **3.5.1 Contributions to practice and research**

Firstly, the in-depth exploration and clarification of the benefits sought after and actually gained by mentors proves to be an extremely powerful tool to inform and reinforce the management practices adopted by mentoring professionals and programs to recruit and retain volunteers. Most of the positive outcomes experienced by mentors are usually not mentioned with the same frequency among their initial motivations to get involved (Table 3 - 1 and Appendix D). This may indicate that the former, albeit representing a highly appreciated by-product of mentoring, may not be fully perceived as such in the moment individuals decide to join. These findings suggest that the communication actions undertaken should raise greater awareness of the extensive range of benefits would-be mentors can attain, adding compelling arguments to incentivize participation from those already predisposed to become mentors, but not entirely persuaded. Also, the analysis clearly indicates in which domains the outcomes most widely appreciated by mentors fall (“Understanding”, “Enhancement” and “Career”). Thus, envisaging gains in these particular areas is likely to be appealing for the wider public. Nonetheless, mentors valued also other aspects, such as the sense of reward stemming from having contributed to bettering the broader society or promoted greater social justice, as well as a stronger connectedness to self, others and society. Better advertising of mentoring as a way to fulfill these needs can further enlarge the audience of people eager to partake.

Secondly, a number of studies report a wide array of negative emotions or outcomes volunteers may run into (Appendix E). However, no study, so far, provided a systematic account of what circumstances these undesirable outcomes are likely to



occur under and of the factors that, singularly or in tandem, contribute to their occurrence. The extended version of the conceptual framework (Appendix B) enables program coordinators to explore in depth all their causes and consequences, allowing a better understanding of the situations to be prevented or redressed to avoid mentor disengagement.

Thirdly, Table 3 - 2 clearly shows which factors influence the most mentors' experience and in which ways, revealing that often these play an ambivalent role, with a number of implications. For instance, the review unearthed an extensive evidence-base pointing to the fact that mentees' progress appears to be one of the elements that most significantly influence mentors' overall perception of the experience. This highlights how crucial it is for program directors to properly inform mentors about the effects of their contributions, making any positive change more apparent, or, conversely, to provide extra support when the latter takes time to materialize. Furthermore, greater efforts should be made to continually assess and promote mentors' self-efficacy, as the attitudes mentors bring to the MR can potentially threaten match endurance. Hence, mentors should be provided with regular supervision in the form of structure, guidance, praise and encouragement, all factors likely to make mentors feel more effective, as well as better positioned to attain positive outcomes. Also, while some mentors appear to experience greater personal development when matched with highly differing or troubled protégés, others may achieve fewer desirable outcomes in similar situations. Thus, program administrators should openly discuss, before matching mentors, what degree of within-pair divergence and mentee's vulnerability they feel willing/comfortable to be exposed to.

At the same time, the study provides fresh scientific knowledge, adding to prior research dedicated to the experiences of mentors in educational settings. Firstly, when grounding the analysis on the well-known theoretical framework of the VFI, mentors' motives and benefits seem to predominantly relate to self-interested gains in terms of understanding, self-enhancement and career. However, the study uncovers a series of motivational or outcome domains that fall beyond the VFI. When these are accounted for, other-oriented themes go back to being among those most frequently reported by mentors, yielding a different broad picture. Echoing the

reflections advanced by Teye & Peaslee (2020), this raises some doubts about the exhaustiveness and suitability of this widely-applied model to fully capture the whole set of determinants and consequences of mentoring for the volunteers. A similar conclusion can be drawn by inspecting the codebook (Appendix A) and noticing how many items of the original scale have been never covered, manipulated or added. In sum, a major contribution of the study consists of having provided an expanded and refined portfolio of items, which lends itself to be empirically tested, validated and refined. It also showcases the perils of continuing to rely on validated instruments, without questioning their fit with the peculiarities of mentoring.

Secondly, the study offers an unprecedented application of a mapping procedure that, as argued by Millar (2020), is particularly promising when it comes to develop program theories. Indeed, by incorporating the views of multiple individuals (over 7,000 mentors who participated in the 57 studies), SODA maps can unveil the existence of differing assumptions and understandings about how and why a program works successfully, producing intended outcomes, or not. More specifically, they may surface various routes to attain a certain outcome (be it desired or to prevent), which can relate to specific components of program design and implementation or the mechanisms triggered by them. Also, depicting visually the highly complex and multifaceted mentoring process can enable an in-depth exploration of the multitude of intertwined components constituting it, as well as of the – potentially competing – explanations and solutions of specific issues of interest. As such, the approach overcomes a major shortcoming of extant pictorial frameworks (e.g., McGill et al., 2015), which are liable to provide a reductive and overly simplistic representation of the core elements underpinning program functioning. Hence, SODA maps are deemed better suited than alternative mapping techniques to supply a detailed road map of the process mentors go through, in such a way that is much more consistent with its complex, sequential, dynamic and even subjective nature.

### **3.5.2 Limitations and directions for future research**

Some of the drawbacks of this review help outline the areas in which mentoring research is still challenged. In this respect, caution needs to be exercised with the interpretation of the links represented in the conceptual framework. As shown by the

prevalence of dashed arrows, most of extant evidence derives from qualitative studies. Even when quantitative research methods have been deployed, the widespread use of cross-sectional, quasi-experimental, one-group designs limits our ability to make causal claims about these associations. Thus, the review's primary merit is to have condensed in a single output (Appendix B) all the possible linkages connecting process elements. Future evaluations can isolate and test some of these, also based on their relative context-specific relevance, either validating or challenging the mentoring process theory proposed. However, it can be argued that mentoring research would generally benefit from a wider use of more rigorous designs. Another substantial shortcoming of the body of literature reviewed is that the negative consequences potentially incurred by mentors are rarely addressed directly by studies (that is, their investigation is not among study objectives nor data collection explicitly focused on them). Given their potential to drain mentors' commitment to the MR or the program, to undermine MR quality, and result in volunteer burnout, greater attention should be paid to their examination. Similarly, scientific knowledge about the consequences of several of the most influential concepts within the map or the determinants of the individual decision to re-commit to a mentoring program seems still limited.

### **3.5 Conclusions**

As an increasing number of educational institutions strive to meet youth demand for supportive MRs, it is critical to build knowledge about the most effective ways of ensuring a wider and sustained participation in site-based mentoring schemes on the part of volunteers. The current review adds to the growing body of literature focused on mentors' experiences within educational settings in a number of ways. Firstly, it outlines the present status of this research area, wherein evidence is beginning to accumulate. Secondly, it provides a comprehensive description of the variety of pathways into mentoring and effects – positive or negative, anticipated or unanticipated – mentors report, while revealing the tangled pathways of influence affecting the components of the mentoring process. Its findings hold the potential to inform program design, implementation and evaluation when it comes to volunteer management. They also highlight several areas where knowledge appears still underdeveloped and further explorations highly recommended.

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## **Chapter 4: Examining holistically the experiences of mentors in school-based programs: a Logic Analysis**

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**Keywords:** school-based youth mentoring; mentor recruitment; mentor retention; program theory-driven evaluation.

## 4.1 Introduction

On the basis of substantial research on the impact of mentoring on the well-being of youth, mentoring has soared in popularity, increasingly seen as a promising preventive intervention for tackling disadvantage, social exclusion and educational disengagement amongst young people, especially those who lack positive and consistent role models within the family or closer social environment (DuBois et al., 2011; Fassetta et al., 2014; Grossman & Rhodes, 2002; Herrera et al., 2011). This practice is based on the cultivation of growth-promoting relationships that bond together protégés (or “mentees”) and older or more experienced role models. Mentors can be non-familial caring adults or near-age peers who provide ongoing guidance, encouragement and emotional or instrumental support (Dubois et al., 2006; Spencer, 2012), helping the mentees accrue positive developmental gains. Within this broader movement, the specific formal and site-based approach of school-based mentoring (SBM) has recently undergone a particularly marked diffusion, to the point of being recognized as the currently fastest growing form of mentoring in the US context (Bayer et al., 2015; Grossman et al., 2012).

Whilst the tremendous expansion of SBM resulted in much attention being paid to evaluating its impacts for the direct beneficiaries and from their perspective, the experiences of the volunteer mentors remained relatively underexplored. Nevertheless, giving closer consideration to these experiences seems important for a number of reasons. Firstly, it would facilitate the establishment of mentoring relationships (MRs) better positioned to stand the test of time. Indeed, mentors’ burnout or dissatisfaction can be a key reason why a substantial part of MRs end up being particularly short-lived, with negative repercussions for the mentees as well (Grossman & Rhodes, 2002; Grossman et al., 2012; Spencer et al., 2017). Secondly, learning what benefits the volunteers pursue and actually realize through mentoring may help to recruit growing numbers of mentors and reduce attrition rates (Stukas et al., 2013), a looming challenge for mentoring organizations. Last but not least, evidencing the broader, indirect impacts of these interventions would yield a fuller picture of their contribution, a key asset in securing funding (Meltzer & Saunders, 2020).

Ultimately, this is an area where more research not only seems necessary but is incredibly valuable. Accordingly, the present article illustrates a qualitative inquiry addressed to explore the perspectives and experiences of those mentoring within the MCR Pathways SBM program in Scotland and develops as follows. It first reviews extant qualitative research into the mechanisms of change through which SBM influences the mentors, highlighting the gaps that prior contributions left in current knowledge and providing a justification for the current study. Subsequently, the data collection and analytic strategies and results of the enquiry are outlined. Finally, some conclusive remarks are drawn, to elucidate in which ways the study extends prior knowledge and its main limitations.

## **4.2 Background**

A recent systematic literature review (Bufali et al., 2021) identified 17 qualitative enquiries focused on the experiences of those who volunteer as mentors in educational settings.

These studies describe the hoped-for gains of serving as mentors, with 11 sources providing some evidence as to why people become involved in mentoring. Reported reasons often trace back to the altruistic desire to assist children in need or to make a difference in their lives (Fassetta et al., 2014; Limeri et al., 2019; Tracey et al., 2014). Often, would-be mentors are driven by the prospect of passing on life experience or professional knowledge, to help their protégés build some skills, or set and achieve goals and ambitions (Dolan & Johnson, 2009; Fassetta et al., 2014; Limeri et al., 2019; Tracey et al., 2014). Also, individuals may pursue anticipated socio-emotional or cognitive gains, seeing mentoring as a way of getting a deeper understanding of socio-cultural matters (O'Shea et al., 2013), learning how to build positive relationships with others or simply testing their mentoring abilities (Limeri et al., 2019). Another frequently mentioned driver is the sense of fulfilment, reward or personal enjoyment candidate mentors expect to attain from interacting with protégés or actually making a difference (Dolan & Johnson, 2009; Fassetta et al., 2014; Limeri et al., 2019; Tracey et al., 2014). Other anticipated benefits rather relate to mentors' professional endeavors. For example, mentoring may be seen as a means to escape from a demanding working-day, improve the quality or productivity of

work, pursue a mentoring-driven professional growth, meet the implicit or explicit expectations of one's own work group, build the CV/résumé or confirm the interest in a certain career (Baker et al., 2015; Dolan & Johnson, 2009; Ernst & Young, 2015; Limeri et al., 2019; Meltzer & Saunders, 2020). Beyond this, mentoring can afford people the opportunity to feel part of a community, contributing to its development by combating socio-economic inequalities in a direct and hands-on way, or of purpose-driven organizations (Ernst & Young, 2015; Fassetta et al., 2014; Tracey et al., 2014). Also, several individuals relate their choice to become mentors to their past experiences, such as having formerly received guidance and encouragement from a mentor or, conversely, having lacked positive mentorship (Limeri et al., 2019; Reddick et al., 2011). Similarly, those who faced some educational challenges may feel a sense of obligation to youngsters who are confronted with comparable issues (Ernst & Young, 2015; O'Shea et al., 2013; Reddick et al., 2011). Finally, participants may feel that they can use the skills and knowledge acquired through their studies, professions or other past experiences (e.g., mentoring informally or in the workplace, volunteering in different fields, etc.) to positively affect a young person's life (Meltzer & Saunders, 2020; Slaughter-Defoe & English-Clarke, 2010).

Likewise, all but one of these enquiries documented the varied positive outcomes accrued to mentors, which either mirrored or exceeded their expectations. First, mentors achieve individual outcomes in the form of a socio-emotional or cognitive personal growth. As already outlined, many people purposively get involved because they feel that serving as someone's mentor can contribute to setting the tone for their protégé's progression in life, to community welfare and the mitigation of socio-economic disparities, or can 'pay forward' the guidance received as a former mentee. By acknowledging the contributions made in these areas, mentors overwhelmingly derive personal satisfaction, sense of purpose and pride, confidence in themselves or their skills and knowledge, as well as their ability to pass them on (Behar-Horenstein et al., 2010; Dolan & Johnson, 2009; Fassetta et al., 2014; Jackling & McDowall, 2008; Limeri et al., 2019; Marshall et al., 2021; McGill, 2012; Meltzer & Saunders, 2020; O'Shea et al., 2013; Reddick et al., 2011; Slaughter-Defoe & English-Clarke, 2010; Tracey et al., 2014). Also, when asked to describe experienced benefits, mentors' accounts most frequently refer to learning. For instance, participation often

pushes mentors to develop greater awareness and understanding about positive youth development (PYD), the wider educational system, or the academic and developmental disadvantage affecting students from impoverished or minority backgrounds (Hughes et al., 2012; Meltzer & Saunders, 2020), as well as openness to others' viewpoints, which leads them to think differently, gain new perspectives or overcome prejudices (Banks, 2010; Dolan & Johnson, 2009; Hughes et al., 2012; Limeri et al., 2019; McGill, 2012; O'Shea et al., 2013; Reddick et al., 2011; Slaughter-Defoe & English-Clarke, 2010; Tracey et al., 2014). Moreover, while mentors may approach their MRs with the expectation that they will primarily offer direction to the mentees, they often realize that the self-reflection stimulated by the experience provides them with valuable insights into their individual journeys, becoming more aware of their strengths or limitations, identity, personality or future ambitions (Dolan & Johnson, 2009; Hughes et al., 2012; Limeri et al., 2019; Marshall et al., 2021; McGill, 2012; O'Shea et al., 2013; Reddick et al., 2011; Slaughter-Defoe & English-Clarke, 2010; Tracey et al., 2014).

Secondly, mentors' reports often concern the relational outcomes gained. In most of the cases, mentors believe they benefited greatly from the experience in terms of skill-building, particularly when it comes to learning to deal with children, building empathy or compassion, sharpening communication, active listening, coaching, leadership, teamwork, support-seeking, time-management or diversity skills, or refining their own ability to appropriately apply self-disclosure, patience or perseverance (Jackling & McDowall, 2008; Limeri et al., 2019; Marshall et al., 2021; McGill, 2012; Meltzer & Saunders, 2020; O'Shea et al., 2013; Tracey et al., 2014). Interestingly, mentors often recognize that these skills had been or could be positively applied to relationships with significant others (McGill, 2012; Meltzer & Saunders, 2020; Tracey et al., 2014). In addition to this, although the study participants of the 17 studies considered here never reported having expectations of gaining new friends thanks to participation, the feeling of friendship developed among mentors, as well as the sense of belongingness and connectedness stemming from close-knit group dynamics, are frequently among the personal outcomes reported by them (McGill, 2012; O'Shea et al., 2013; Pryce et al., 2015; Slaughter-Defoe & English-Clarke, 2010).

Thirdly, as increasingly acknowledged by employers as well (Ernst & Young, 2015), mentors gain a number of practical, work-related outcomes. These include the development of contacts or skills deemed essential for success in their professions, recalling “forgotten” knowledge or thinking through their work from different perspectives, improving the relationships established with co-workers, gaining clarity on the career path they want to undertake, feeling well-suited for job positions that involve substantial mentoring tasks or taking a break from tedious or stressful work activities (Banks, 2010; Dolan & Johnson, 2009; Ernst & Young, 2015; Hughes & Dykstra, 2008; Jackling & McDowall, 2008; Limeri et al., 2019; Marshall et al., 2021; McGill, 2012; Meltzer & Saunders, 2020; Reddick et al., 2011; Slaughter-Defoe & English-Clarke, 2010).

These preliminary findings appear extremely encouraging, given the variety of motivating factors and outcomes documented. However, it is argued that this strand of literature still suffers from various limitations, so that more exploration of some aspects of program participation is warranted. First, such analyses (17 in total) are in short supply, confirming that, so far, relatively scarce attention has been given to qualitatively exploring the ways in which SBM can have an impact on the volunteers themselves. Second, extant research has largely focussed on student mentors (65% of the studies, excluding: Baker et al., 2015; Behar-Horenstein et al., 2010; Ernst & Young, 2015; Fassetta et al., 2014; Meltzer & Saunders, 2020; Tracey et al., 2014), so that little is known on which are the managerial practices best suited to strengthen the initial and ongoing engagement of different demographic groups. Third, prior studies are mostly descriptive of motives or positive outcomes. Indeed, they largely overlooked the negative outcomes incurred by mentors (explicitly addressed only by four studies) or the enabling/hindering factors at work (seven studies), struggling to unveil under what conditions positive change occurs. In this respect only one evaluation (McGill et al., 2015; McGill, 2012) sought to provide a comprehensive conceptual framework summarizing the theory according to which SBM brings about positive change, explicitly addressing the interplay among process constitutive parts (e.g., motives, outcomes, factors). This model, however, is considered somewhat questionable, as bearer of an overly simplistic conceptualization of the mentoring process.

Overall, it seems that there is still much to be learned about the experiences of volunteer mentors and a persisting need to turn greater attention specifically to the examination of the negative impacts of participation and the factors determining mentor outcomes. This study intends to address this gap in knowledge by providing a comprehensive outline of the change process experienced by the mentors of an existing SBM program. More explicitly, it will address the following set of research questions: what is the Theory of Change (ToC)<sup>10</sup> according to which the SBM scheme being evaluated achieves its intended mentor outcomes? In which respects does this ToC differ from a conceptual framework built based on pertinent research literature? What can be learned from these points of differentiation?

### **4.3 Methods**

#### **4.3.1 Research setting**

The scheme featured in the current study is a formal school-based mentoring (SBM) program run by the charity MCR Pathways since 2007. It was created for the purpose of attenuating the transmission of child and youth disadvantage into adult life by providing extra one-to-one support to the most disadvantaged secondary school pupils in Glasgow, Scotland. In particular, at its onset, the program was addressed to an extremely vulnerable segment of the youth population: young people who were or had been looked after by local authorities. Nonetheless, nowadays, care-experienced youth account for approximately 60% of the beneficiaries of the program (MCR Pathways, 2017), which also serves youth not formally assisted by social workers, but facing other non-negligible forms of disadvantage (e.g., in informal kinship or families facing addiction problems, young carers). Acknowledging the extent of the educational challenges these pupils may face, the charity recruits community adult volunteers who establish one-to-one MRs with these young people, seeking to help them discover their talents and realize their full potential. Initially delivered in just one site, the program was then piloted in an additional five schools, before going

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<sup>10</sup> A tool that provides a detailed and visual representation of how certain activities or events are understood to produce a chain of results (be they intended/desired or not). It is used to make explicit the underlying rationale of an intervention, program, project, strategy or policy, describing the mechanisms through which change is expected to occur.



through a larger-scale rollout<sup>11</sup>. At the end of 2018, all the 30 secondary schools in Glasgow City Council's remit were served.

In the intervention model developed by MCR, their central office manages mentor recruitment and initial/ongoing training, whereas the match-making process is carried out in collaboration with salaried Program Coordinators, who operate within each school and oversee the local delivery, liaising with both the central staff and school personnel, while providing supervision and bespoke support to all the mentor-mentee pairs. The latter meet weekly in one-hour sessions taking place throughout at least one academic year and, ordinarily, on the school's premises. However, while this study was conducted, the social distancing measures introduced to contain the Covid-19 pandemic entailed that more recent interactions have been held also remotely, in multiple formats (i.e., pen pals, chats, voice/video calls).

#### **4.3.2 Study participants**

This study draws on qualitative interviews conducted with 12 volunteers of this SBM program and examines how they viewed their experiences as mentors of at-risk young people. After receiving ethical approval from the University of Strathclyde Department of Management Science Ethics Committee, two pilot interviews were carried out, to trial questions and their format with volunteers, while ascertaining whether the duration envisaged could be adequate to address all the topics of interest. As pilots developed successfully, evidencing no need for particular adjustments, data from these pilots were included in the main analyses. Subsequently, the MCR central team received clear instructions about the criteria for inclusion to follow to select the remaining 10 participants. The staff established an initial contact with individuals presenting the desired profile, assessing their interest in participating. Having gained a first expression of interest, the researcher shared via email the Participant Information Sheet, Consent Form and a summary of the topics of discussion, further delineating in an accessible way study objectives and the implications of participation. All the individuals approached expressed their informed consent to participate and to be audio-recorded.

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<sup>11</sup> In terms of operational delivery, in Glasgow, other four groups of schools introduced the program respectively in: 2015 (5 schools), 2016 (4), 2017 (5) and 2018 (15).

The sampling considered a number of characteristics that not only could be assessed a priori, but were also deemed highly influential as to several aspects of the mentors' volunteering experience (e.g., driving motivations, outcomes, difficulties encountered). The selection of study participants mostly relied on a proportional quota sampling strategy (Robson & McCartan, 2016), so that the composition of the sample resembled the population distribution across a variety of dimensions (Appendix A), such as: mentors' gender, age, or affiliation (i.e., corporate or individual volunteer); mentee's status (i.e., looked after by the local authority or not) and school's characteristics (e.g., location; level of risk<sup>12</sup>; year of adoption of the program). The sampling, instead, does not reflect the proportions characterizing the whole population as regards the length of mentoring service (more/less than 2 years) and of the match (more/less than 20 meetings). In fact, novice mentors are slightly under-represented, in part due to the staff being less familiar with their profile. Conversely, mentors in the earliest stages of the MRs are over-represented, to counterbalance their lesser participation in a survey conducted in parallel with this study and to gain a better understanding of the specific challenges they may face during this particular phase.

### **4.3.3 Data collection**

Insights into mentors' experiences were gained using semi-structured interviews. Mentors, identified using pseudonyms hereafter, were interviewed through video conferencing platforms, with discussions lasting approximately 40-70 minutes. The guide for the individual interviews was developed by consulting similar published protocols known to the first author (McGill, 2012; Vareilles et al., 2015) and subsequently reviewed by a pool of experts, comprising both academics and program managers (many of whom held personal experience as mentors as well). It consisted of a pre-defined list of interview questions (Appendix B), designed to seek reports of:

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<sup>12</sup> The classification is based on historical data (2013/2014) on the proportion of pupils, within each school, living in the 20% most deprived data zones and looked after by local authorities.

- what influenced participants' decisions to become mentors and what they expected to get out of the experience (motivations and sought-after outcomes);
- the gains acquired (experienced positive outcomes);
- the unintended, adverse ways mentoring may have influenced volunteers' lives (negative outcomes and feelings);
- the factors that most eased or hindered the attainment of outcomes (facilitators and barriers);
- the mechanisms and patterns through which outcomes were realized.

#### **4.3.4 Data Analysis**

The study traces back to the broader approach of program theory-driven evaluation (PTDE), whose main output is usually represented by a framework that schematically portrays the main mechanisms and underlying assumptions according to which a program is supposed to achieve its intended outcomes (so-called program theory). In particular, it relied on a Logic Analysis: a three-step "*evaluation that allows us to test the plausibility of a program's theory using available scientific knowledge – either scientific evidence or expert knowledge*" (Brousselle & Champagne, 2011, p. 70). Firstly, the analysis produces a preliminary Theory of Change (ToC) depicting how the program in action (i.e., the MCR Pathways scheme) is expected to work in the perspective of mentors. Secondly, extant scientific knowledge is reviewed, synthesized and drawn on to derive a conceptual framework that summarizes the causal chains toward the effects as understood and reported by prior research. In the final stage, a "plausibility check" is performed to assess the degree of consistency between the theories captured in the two previous outputs. The practical usefulness of engaging in such an elaborated analytic procedure precisely lies in getting to reveal in which respects the program theory fits with or deviates from current knowledge about best-practices, indicating the strategies and corrective actions that can be undertaken to further develop the program's ability to achieve its desired outcomes.

#### **4.3.4.1 Steps 1 & 2: Preliminary Theory of Change & Conceptual Framework**

The preliminary ToC has been derived drawing on the interview data gathered as described above. Conversely, the literature-based conceptual framework is based on the research findings of 57 empirical studies on mentoring in educational settings, retrieved through a systematic literature review illustrated in greater detail elsewhere (Bufali et al., 2021). While the evidence that populated the two frameworks came from distinct sources, the analytic approach adopted was consistent, as described below.

##### **3.4.1.1 Thematic analysis**

Using NVivo 12 (QSR International Pty Ltd., 2018), data either from the interviews (audio-recorded and transcribed verbatim) or the studies included in the literature review were thematically analyzed (Braun & Clarke, 2006). From an epistemological standpoint, in keeping with a critical realist stance (Brousselle & Buregeya, 2018), an abductive approach (Dubois & Gadde, 2002, 2014) was taken to generate both the frameworks: while the analysis was approached with a set of preconceived, theory-driven categories, field evidence allowed population of the codebook with several novel constructs. In particular, the preliminary template combined elements drawn from extant theory, which informed the conceptualization of: mentors' motives and rewards (Clary et al., 1992, 1998; Ferro, 2012; Teye & Peaslee, 2020); unanticipated negative outcomes and feelings (McGill et al., 2015; Stukas et al., 2009); or processual barriers and facilitators (Martin & Sifers, 2012; McGill et al., 2015; Harris & Nakkula, 2008; Rubin & Thorelli, 1984). An iterative process of refinement led to the final codebook, which includes both the initial and conclusive sub-themes and illustrates the coding hierarchy, such that more discrete items are grouped into higher-level headings, in turn divided into broader conceptual categories: motives and positive outcomes that can be either traced back to the well-known Volunteer Functions Inventory (VFI) (Clary et al., 1992) or not; negative outcomes and feelings incurred by mentors; and process factors (further divided into barriers and facilitators). When presenting study findings, some meaningful quotes extracted from interviews will be provided. Furthermore, in order to facilitate a holistic appraisal of interview data, these have been tabulated, so that the matrices presented in the

following sections show which sub-themes (rows) have been discussed by which interviewees (columns).

### **3.4.1.2 Mapping**

Using the Decision Explorer 3.5.0 software (Banxia Software Ltd., 2017), the codified extracts were visually rearranged adhering to the mapping technique put forward by Eden (1988), to produce coherent pictures of the program functioning respectively according to extant scientific knowledge and field evidence. Focusing on the preliminary ToC, the subjective thinking of each interviewee was retrospectively summarized in 12 distinct “cognitive maps” (Eden, 2004), then merged to derive a unique model.

These maps can be seen as sorts of blank canvas to portray participants’ voices and beliefs and appear as “directed” graphs, wherein arrows connect means and ends, delineating alleged causal relationships (the concept at the arrowhead is assumed to be influenced by the tail statement). Usually, at their top, we find high-order goals that an organization pursues, with more detailed avenues leading to them (chains of events/enabling conditions) unfolding underneath. In the current study, concepts are pooled into two clusters, respectively culminating with the decision: i) to take on the mentoring role (Figure 4 - 1); ii) to renew one’s commitment to mentoring (Figure 4 - 2).

It is worth stressing that whilst the tables allow ranking the various themes surfaced based on their prevalence, the pictorial models unveil the intricate net of relationships among process components, as well as their often-ambivalent nature. Also, computer-assisted analyses can further facilitate the identification of some informative structural features of the maps. For instance, domain analysis (Eden et al., 1992) returns information about the number of arrows pointing to or departing from a concept and has been used to detect the 10 most interlinked nodes of the maps, namely those that affect and are affected by the greatest number of other elements.

Given the richness of the model obtained (Appendix C), a simplified version is provided here, wherein only higher-level motivational or outcome categories are reported, rather than the more discrete sub-themes composing each of them.

Furthermore, only those factors which turned out to be among the 10 most influential concepts in the map – as the domain analysis<sup>13</sup> highlighted – have been included.

#### **4.3.4.2 Step 3: Direct logic analysis**

In the conclusive step, “direct logic analysis” (Brousselle & Champagne, 2011, p. 70) is used to evaluate the program-specific model (ToC) and its discrete components against the motives, outcomes, enabling/impeding mechanisms reported in pertinent academic literature. This “plausibility check” also involved MCR managers in contrasting the two theories, challenging the analyses conducted and testing the soundness and exhaustiveness of the ToC produced, as well as its consistency with the conceptual framework. As such, it provided an arena to reflect on these issues so as to pinpoint strengths and/or weaknesses of the MCR Pathways *modus operandi*.

### **4.4 Results**

#### **4.4.1 Motivations**

Mentors’ motives for mentoring at-risk youth were a primary area of concern. The following matrices include only the items addressed by mentors interviewed, indicating whether a certain aspect was identified as a motive for (first row) or outcome of (second row) participating and whether it was traced back to one of the classical six functions of the VFI (Table 4 - 1) or represented an emergent concept (Table 4 - 2).

As can be seen, all interviewees endorsed more than one motivation and mostly other-oriented motives, primarily seeing mentoring as a means to live up to their altruistic values or as a reflection of their community concerns.

Starting from the sub-themes traceable to the “Values” function of the VFI, the reason most recurrently endorsed (25% of mentors) was helping a young person create and progress toward a better future. For instance, a mentor, reflecting on how much being raised in a nurturing and supportive home environment helped her get on the right track in terms of educational and professional achievements, concluded that:

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<sup>13</sup> Based on the full version of the ToC, rather than on the simplified one.

*“[...] knowing that I could help someone else on that journey and maybe be [...] someone on the back who’s saying ‘Actually you can’t do this!’, giving them that little push that they need ... that for me was one of the main reasons why I wanted to do it.” [Eloise]*

Interestingly, the discrete item absolutely cited the most (50% of mentors) falls beyond the VFI and relates to concepts of paying or giving something back, contributing to enhancing the broader community. In this respect, some mentors felt particularly drawn to mentoring as a way to drive change, actively doing something to transform the society, rather than simply contemplating this ideal or handing money over.

It should also be noted that 75% of participants reported that some prior experiences either made them more sensitive or better prepared for youth mentoring. Coherently, the domain analysis illustrated below (Table 4 - 6) identified these “sensitizing experiences” as the 10<sup>th</sup> most interlinked concept within the map. Indeed, a number of mentors recounted that they came from underprivileged backgrounds, were first-generation graduate students or had a direct experience of family breakdown, domestic abuse or the care system. So, often they approached mentoring as cognizant of how significantly having had an informal/natural mentor helped them cope with these difficulties:

*“[...] why I survived was that I had a significant adult, my auntie, who was my strength, she was my role model. [...] And I thought, so many kids, in difficult family situations, need someone out there that’s [...] just there for them.” [Diane]*

Nonetheless, the same sense of gratitude permeated the words of those who felt supported by a mentor, while growing up, even if not confronted with comparable struggles, as with Bernie: *“[...] I’ve had all these great experiences and I think a lot of it can be put down to a teacher or a parent encouraging me at the right time” [Bernie]*. Many mentors also spoke about how the mentoring skills acquired both through private or professional experiences made them more confident about their

ability to make a difference in a young person's life. These spanned from volunteering at child helplines to befriending vulnerable elderly, from teaching to mental health nursing, from being a parent, aunt/uncle or grandparent to having mentored younger colleagues at the workplace. Some of these drivers, instead, took on more self-interested connotations, such as missing the company of one's own grown-up children, or of youth the mentors usually worked with, or not having had children of your own.

Next to these dominating themes – in ascending order: “Values” (six occurrences), “Civic concern” (seven) and “Sensitizing experiences” (15) – mentors reported a number of less widespread motivations<sup>14</sup>, suggesting how varied the needs potentially met by this type of volunteering are, even in the context of a single program.

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<sup>14</sup> These included challenging yourself or broadening one's own network of contacts, developing transferable skills that can come in handy from a professional standpoint, escaping from work/academic commitments or, conversely, gaining insights into the core focus of a mentor's job or field of study: positive youth development. Finally, another noteworthy area of sought-after outcomes pertains to the desire to belong to an organization that is run effectively and promotes values the mentor identifies with or to the local community (for instance, for mentors who recently settled in Glasgow).



**Table 4 - 1 VFI Motives and Outcomes**

Themes & sub-themes		Study participants											N. of times each theme is discussed				
		<35	35-40		41-55			56-64			65+			% of mentors discussing each sub-theme			
		F	M	F	M	F	M	F	M	F	F	M			F		
		Celine	Bernie	Eloise	Patrick	Giselle	Edwin	Phoebe	Neil	Diane	Sally	Albert	Vivian	As a motive	As an outcome	Tot	
<b>VALUES</b>	Compassion/help less fortunate							X						8%	6	6	12
														0%			
	Help others													0%			
				X		X								17%			
	Make a difference in a YP <sup>15</sup> 's life					X								8%			
				X										8%			
	Help a YP create a better future		X	X			X							25%			
							X							8%			
Help a YP work									X				8%				

<sup>15</sup> YP = Young Person

	through issues			X								X		17%			
UNDERSTANDING	Learn about PYD													0%	1	21	22
	or target group	X		X			X		X	X				42%			
	Learn about social													0%			
	issues											X		8%			
	Gain new													0%			
	perspectives			X	X		X		X		X	X		50%			
	Learn through													0%			
	experience	X	X	X	X	X	X				X	X		67%			
Become more	self-aware							X						8%			
								X						8%			
ENHANCEMENT	Enhance self-													0%	1	19	20
	esteem	X		X		X						X		33%			
	Feel valuable to													0%			
	others						X			X		X		25%			
	Feel good													0%			
		X		X	X	X	X	X		X	X	X	X				
Make new friends	X													8%			
	X										X			17%			

<b>PROTECTIVE</b>	Feel less lonely												X	8%	4	5	9	
		X						X										17%
	Relieve of guilt			X					X									17%
																		0%
	Escape from work life	X																8%
X			X				X							25%				
<b>CAREER</b>	Reinforce foundat. knowledge	X												8%	2	7	9	
		X					X							17%				
	Build skills		X															8%
			X				X											17%
	Improve work relationships																	0%
			X					X										17%
Career clarification				X										0%				
														8%				
<b>SOCIAL</b>	Implicit expectations	X												8%	1	2	3	
																		0%
	Benefit other personal relat.																	0%
					X							X						17%

**Table 4 - 2 Additional Motives**

Themes & sub-themes		Study participants											% of mentors discussing each sub-theme	N. of times each theme is discussed				
		<35	35-40		41-55			56-64			65+			As a motive	As an outcome	Tot		
		F	M	F	M	F	M	F	M	F	F	M					F	
<b>CIVIC CONCERN</b>	Give back	X	X		X		X						X	X	50%	7	1	8
													X		8%			
	Social justice								X						8%			
<b>ORG.</b>	Well-established/ well-run, renowned organization		X												8%	1	1	2
										X					8%			
<b>ATTACHMENT</b>	Organization/ program		X												8%	2	3	5
								X							8%			
	School														0%			
								X							8%			
	Community	X													8%			
		X													8%			

<b>SENSITIZING EXPERIENCES</b>	Experienced family breakdown									X				8%	15	0	15	
																		0%
	Benefitted from mentor		X	X							X							25%
																		0%
	First-generation graduate/ ethnic minority student												X					8%
																		0%
	Experienced disadvantage					X							X					17%
																		0%
	No children										X							8%
																		0%
	Children grew up										X							8%
																		0%
	Helping profession										X			X				17%
																		0%
	Exp. akin to youth mentoring			X	X					X								25%
																		0%
	Acquaintance benefitted from mentoring											X						8%
																		0%

#### 4.4.2 Positive Outcomes

Mentors described a range of gains that outnumbered reported motivations (65 occurrences for outcomes, as opposed to 40 for motives), which leads us to believe that the functions mentoring serves are wider and more diverse than mentors would expect. Moreover, the areas where most of the mentors accrued benefits do not match the three dominant motivational domains described above, again suggesting that the former seem often not consciously perceived as attainable gains in the moment mentors decide to sign up.

Most notably (Table 4 - 1), mentors unanimously reported some type of gains in terms of enhancing their understanding (21 occurrences) of oneself, others, or the world. Often (42% of interviewees), mentors got insights into what fosters or, conversely, prevents PYD. Half of the mentors also believed that the experience made them more open-minded and appreciative of others' differing perspectives or even helped them debunk some stereotypes about the educational system or youth themselves:

*"[...] prior to becoming a mentor, [...] I was very much the kind of person who, if I was out with my friends in a public place and I saw a group of teenagers, I'd be like: 'Uh, they are just so loud, they can't behave!' [...] and mentoring has given me an entirely different perspective on it. I would never ever judge a young person based purely on like how they look or their sort of attitude [...]"*. [Eloise]

An even greater number of mentors (67%) appreciated the learning curve mentoring entailed, as they sharpened a number of skills: from those entailed in trust-building and dealing with youngsters – who might be either too shy or too talkative, or simply from backgrounds that bear no relationship to yours – to communication, listening and coaching skills, or even, finally, to greater empathy or patience.

Another major theme relates to the self-enhancement gains accrued to mentors (19 occurrences and the sixth most interlinked concept). These take the form of an overwhelming sense of satisfaction, fulfilment, self-confidence or even pride derived

from seeing the mentee making progress, the bond deepening, or knowing that you're doing something worthwhile. Interestingly, at times, these gains stemmed also out of getting an hour away from the working routine, just to breathe and completely focus on someone else, as one mentor described: “[...] every single time you would have this meeting and [...] you would just feel as though an entire weight had been lifted off of your shoulders” [Eloise]. Ultimately, some participants felt mentoring improved their work-life balance, helping them put everyday problems into perspective.

Even though mentors described many other types of gains (see Table 4 - 1 and Table 4 - 2), attention is here drawn to two usually less discussed sub-themes, which, albeit not included in the VFI, resonate with its “Social” and “Career” functions: the benefits mentoring can yield for mentors’ other private or professional relationships. For example, some interviewees acknowledged that the experience improved their relationships with friends or young relatives, while for others it was with co-workers:

*“I was a much better manager. I’m so much a better employee, when I went back to work that day, because I’d had that time away from the office [...].” [Phoebe]*

This also resulted from becoming more reflective and conscious about one’s own strengths and, most importantly, shortcomings as a professional: “[...] it made me look at myself as a manager, you know. Was I actually doing a good job? Was I listening to people that maybe I haven’t been listening before?” [Phoebe].

#### **4.4.3 Negative Outcomes and Feelings**

Overall, study participants discussed two and a half as many gains as negative outcomes and feelings (Table 4 - 3), which, nonetheless, turned out to be quite common and widespread.

**Table 4 - 3 Negative Outcomes and Negative Feeling – “Whitin-pair” & “Extra-pair”**

Themes & sub-themes		Study participants											% of mentors discussing each sub-theme	N. of times each theme is discussed	
		<35	35-40		41-55			56-64			65+				
		F	M	F	M	F	M	F	M	F	F	M			F
		Celine	Bernie	Eloise	Patrick	Giselle	Edwin	Phoebe	Neil	Diane	Sally	Albert	Vivian		
<b>Negative Outcomes - Within-pair</b>	Self-esteem...					X								8%	26
<b>Negative Feelings - Within-pair</b>	Hesitation...fear...	X	X			X		X			X	X	X	<b>58%</b>	
	Vicarious stress...					X			X	X	X			33%	
	Nervousness, anxiety ...	X												8%	
	Discouragement ...frustration			X		X		X	X			X	X	<b>50%</b>	
	Disappointment ...upset					X		X				X	X	33%	
	Conflicted... overwhelmed					X				X				17%	
Shame, guilt					X								8%		
<b>Negative Feelings - Extra-pair</b>	Frustration					X								8%	1
<b>Items covered by each mentor</b>		2	1	1	0	8	0	3	2	2	2	3	3		



Most of these unintended adverse effects relate to negative feelings associated with actual or anticipated relational dynamics with the mentee. In particular, several mentors (58%) discussed feelings of hesitation or fear experienced prior to commit to mentoring (the seventh concept in the domain analysis). These are attributable to a number of factors, such as the perception of not being prepared to handle potentially difficult or even harmful situations, as well as alarming information the mentee may disclose. Others worried that their demanding job commitments could prevent them from being consistent and reliable or felt daunted by the long timeframe a MR can require to thrive. These emotions were also exacerbated by the awareness of not being able to just quit if things did not work out as expected. A few mentors revealed that they feared that their prospective mentee could not accept or like them, potentially disappointed by their personality or age:

*“And I was a little bit worried about: ‘What if they don’t like me?’ [...] if I was a young person, I think I would probably prefer somebody young [...].” [Vivian]*

Other widely discussed negative emotions concerned feelings of discouragement, sadness and frustration (reported by 50% of mentors and the third most influential concept in the map) or even disappointment and upset (33%). Similar states were often triggered by discovering the severe hardships faced by the young person, getting stood up by the mentee or the Program Coordinator, who missed a meeting, or stemmed from feeling somewhat restricted by all the safety measures in place. Another major stressor was facing the conclusion of a match, especially if abrupt and due to external causes:

*“[...] one of the frustrations I have is that, if it was not for the pandemic, I think he would have developed more [...] there’s clearly a frustration on my part, that we could do more, and a fundamental sadness.” [Neil]*

#### **4.4.4 Facilitators and Barriers**

As the number of factors that can affect – either positively or negatively – mentors’ experience is relatively large (full details in Appendix D), attention is here drawn

only to those five factors that are both highly discussed by mentors interviewed (Table 4 - 4) and among the most influential within the ToC, as the domain analysis evidenced (Table 4 - 6).

**Table 4 - 4 Incidence of selected factors**

Sub-themes	Study participants											% of mentors discussing each sub-theme	
	<35	35-40		41-55			56-64			65+			
	F	M	F	M	F	M	F	M	F	F	M		F
	Celine	Bernie	Eloise	Patrick	Giselle	Edwin	Phoebe	Neil	Diane	Sally	Albert	Vivian	
Mentor receives adequate/inadequate supervision & staff support	X				X							X	25%
	X	X	X	X	X	X	X	X	X	X	X		<b>92%</b>
There are/are not differences (with mentee)	X				X					X		X	33%
	X			X					X		X		33%
Mentor had (prior) positive/negative experiences or saw/did not see the change						X	X	X		X		X	<b>42%</b>
	X		X	X		X	X		X	X	X	X	<b>75%</b>
Candidate Mentor/Mentor lacks/does not lack self-efficacy	X		X	X	X		X		X	X			<b>58%</b>
			X	X	X				X			X	<b>42%</b>
Candidate Mentor/Mentor feels normatively committed										X			8%
		X	X		X		X				X		<b>42%</b>

Among the range of programmatic factors identified, a theme that particularly stood out for its salience relates to the on-site supervision and support provided by the Program Coordinator, which turned out to be the fifth most interlinked concept in the map. Mentors almost unanimously (92%) identified in the Program Coordinator a key facilitator of their mentoring journey: somebody who provides encouragement and positive reinforcement when mentors are beset by insecurities, who can check in and keep mentors informed when mentees go through particular issues, as well as an essential reference point when mentors do not know precisely how to respond to mentees' behaviors or statements. For instance, a novice mentor, still grappling with building her mentoring skills, particularly appreciated that the Program Coordinator began each video call with the mentee. This afforded her the opportunity to observe the Program Coordinator's reactions to what the mentee brought up, having a sort of benchmark to grasp what should (or not) raise preoccupations:

*“So, that's been nice to actually having a bit more contact with the coordinator. It's just a bit of reassurance, like if my mentee says something or brings up a story while XXX [name of the Program Coordinator] is there, if it's something that normally I'd be like ‘This sounds a bit dubious’ and XXX [name of the Program Coordinator] is fine about it, I'm like: ‘Okay, this is probably like a fine thing. We can just discuss it without worrying’.” [Celine]*

For several mentors, the Program Coordinator further made them feel as part of a wider team of people who take joint responsibility for the wellbeing of that particular young person or of what looked like a real family:

*“I've been talking about the ‘MCR family’ and that's what it does feel like. [...] You do feel very much part of that community and part of that smaller community within the school, because you are getting the support from the Program Coordinator.” [Phoebe]*

However, some participants (25%) raised some issues as regards the interactions with the Program Coordinator, which primarily related to the impression of having limited access to face-to-face or phone updates. This sensation was attributed to the fact that – as the reach of the program expands – Program Coordinators may appear to be caught up in too many commitments or that direct discussions are appropriate only if there are serious issues to raise, rather than a general unease.

Moving to the relational factors, as the fourth most influential concept, we find: “Mentor had (prior) positive/negative experiences or saw/did not see the change”, often acting both as a facilitator (75%) and as a barrier (42%). Three-quarters of the participants spoke about the sense of reward and fulfilment derived from seeing the mentee overcoming some problems (e.g., attitudinal, behavioral, academic) or successfully entering higher and further education or the job market. Opposite sentiments arose when things did not progress as expected or desired, which challenged mentors with feelings of frustration and discouragement, or a lack of confidence as to their mentoring abilities.

Similar insecurities were triggered also by potential differences with the mentee, the eighth concept in the rank. Some mentors (33%) truly appreciated dealing with pupils with very different attitudes, interests, mindsets or backgrounds, as it kept their mind “open” and “fresh”, made them more understanding or less judgmental and equipped with interpersonal skills that could benefit their other relationships. Conversely, often (33% of cases), navigating these diversities gave rise to some difficulties, concerns, or doubts. For example, one interviewee questioned what a non-native mentor, from a privileged background, could actually offer to an adolescent with such a different social and home life, being afraid of not being able to find any shared life experience to build on. Another confessed that some problems of the boy she mentored “*maybe would have been dealt with had it been a man [...]*” [Sally]. Overall, mentors’ perspectives as to within-pair differences turned out to be pretty mixed and discordant, as exemplified by the following case: while Vivian, as anticipated, worried about the age gap, Diane saw it as a real asset:

*[...] I think having a big age gap takes away any confusion.  
There's no way I want to be her pal but I am a supportive*

*adult, for whenever she needs to talk to someone. And I think that is easier to hold that ground when there's a big age gap [...].” [Diane]*

The issues just discussed strongly relate to the first individual factor deserving attention: mentor self-efficacy, which was found to be the most influential concept in the ToC and both enabled (42%) or hindered (58%) the realization of desirable outcomes. Many circumstances that undermined mentors’ confidence in their own abilities have been previously discussed (e.g., not seeing the hoped-for change, substantial differences, communication difficulties) or can be identified exploring the extended version of the ToC (Appendix C). Interestingly, two mentors provided additional insights into what can make mentors feel somewhat inadequate:

*“[...] when you do the training, they show you all these people saying how much they’re loving their mentor, how fabulous it is and that it was great. And then, you think: ‘Well, mine is just kind of okay’ [...].” [Vivian]*

Always in reference to the training, another element can contribute to mentors’ feelings of unpreparedness: two interviewees hinted that the match-making process required more time than expected, a problem that the Covid-19 pandemic may have exacerbated. This implied being trained long before actually starting meeting their mentee. It is also worth pointing out that, within this study, female mentors seemed to suffer the most from these issues, appearing far more inclined to doubt or even blame themselves in the face of setbacks.

Finally, the ninth most interlinked concept is normative commitment, intended as a sense of obligation to carry forward the MR in order not to let down or harm the mentee. While a few mentors stated that they would not quit mentoring because the benefits gained exceeded the indirect costs incurred, others (42%) – who even found the experience stressful or challenging – explicitly referred to this concept:

*“I definitely had meetings or days where I was like: ‘This is haaard!’, [...] but quitting just never crossed my mind because that wouldn’t have fixed it... you know, it might have*

*made me feel better in the long run, because I removed myself from the situation, but I wouldn't have left the girl knowing that this young person needed [...] someone and I wasn't there for her.” [Eloise]*

#### **4.4.5 Direct logic analysis**















In order not to overwhelm readers with a detailed description of the conceptual framework, this paragraph offers only a summary of the key insights uncovered by the conclusive step of the Logic Analysis, emphasizing the aspects that bring together or distinguish the literature-based conceptual framework (Bufali et al., 2021) and the ToC drawn from interview data (Figure 4 - 1 and Figure 4 - 2).

As summarized in Table 4 - 5, mentors' motives and positive/negative outcomes are reported in these figures within squared boxes, whose color indicates the category they belong to. Those concepts not framed in boxes are, instead, processual factors<sup>16</sup>. As regards the connections among concepts, arrow heads with a negative sign attached (“-”) indicate that the tail statement negatively affects the concept at the other end of the arrow. Pink linkages land on those elements that can interrupt a chain of events and should be read as a “*but*”. Dashed green arrows indicate a causal link that is just hypothesized/anticipated, whereas solid ones stand for bidirectional influences. Finally, light blue arrows indicate that the influence of the tail concept has been found to be both positive and negative.

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<sup>16</sup> All the elements that allow (facilitators) or hinder (barriers) the occurrence of a positive outcome or, conversely, that allow (barriers) or hinder (facilitators) the occurrence of a negative outcome. Within this study, they may pertain to: programmatic features; relational dynamics; individual characteristics of either the mentor or the mentee; mentors' interactions with actors surrounding the pair; other aspects.

**Table 4 - 5 ToC legend**

Color used		Category	
	Light blue	Values	VFI Motives & Positive Outcomes
	Light green	Understanding	
	Pink	Enhancement	
	Purple	Protective	
	Light orange	Career	
	Brick red	Social	
	Powder blue	Civic Concern	Additional Motives & Positive Outcomes
	Dark blue	Sensitizing experiences	
	Yellow	Attachment	
	Pale yellow	Organizational	
	Turquoise	Self-concept	
	Dark red	Service requirements	
	Blue	“Within-pair”	Negative Outcomes and Feelings
	Fuchsia	“Extra-pair” <sup>17</sup>	
<i>Abc</i>	Fuchsia	Programmatic	Barriers and Facilitators
<i>Abc</i>	Dark purple	Relational	
<i>Abc</i>	Dark green	Individual	
<i>Abc</i>	Turquoise	Broader “social ecology”	
<i>Abc</i>	Electric blue	Others	

While both the literature review and the evidence from fieldwork highlight that the expression of altruistic values is a central motivational factor for aspiring mentors, several differences became evident. For instance, although indicated as extremely important in the body of literature analyzed, the pursuit of self-enhancement gains (e.g., feelings of being useful and needed or simply good about oneself) was seldom endorsed as a motivation to join the MCR Pathways program. Conversely, other reasons that seem of more limited interest according to extant literature, such as

<sup>17</sup> They stem from how mentoring affect other areas of a mentor’s life (e.g., work, personal relationships), rather than form within-pair dynamics.



community concerns or the “sensitizing experiences” described before, acquire in the context of this specific program striking salience.

In terms of gains, the two frameworks and underlying analyses consistently reveal that these overwhelmingly relate to gaining new understandings or a sense of reward, satisfaction and enjoyment. A certain degree of coherence characterizes the frameworks also when it comes to the career-related benefits mentors pursue or accrue. While this area is largely more addressed in the wider literature, this simply reflects the over-representation, in prior studies, of younger cohorts of mentors (i.e., high school and university/college students). Interview data (Table 4 - 1) highlight a clear-cut demarcation between the mentors who are or not sensitive to these fallouts (up to 55 years of age), confirming how valued they are for those who are still developing professionally. Also, both the documentary and field exploration of mentors’ perceptions revealed some less acknowledged and investigated outcomes, such as the spill-over of the experience on mentors’ private and working relationships, an area of inquiry future research should pay greater attention to. Nonetheless, the analysis also pinpoints some noteworthy elements of differentiation. For instance, in the context of the MCR program the ego-protective function served by mentoring (such as the relief due to escaping from a hectic working day<sup>18</sup>) turned out to be more strongly perceived. Conversely, mentors interviewed reported far less frequently motivations or benefits related to establishing new friendships or developing a sense of belongingness to the mentoring group/program or the wider community, suggesting that those managing this scheme may better exploit a seemingly untapped potential of the mentoring experience for fulfilling these needs.

Moreover, Table 4 - 6 indicates which were the 10 concepts found to be the most influential or interconnected within the ToC and their relevance within the literature-based conceptual framework. As the two sets of rankings show, consensus is achieved on a number of factors considered most to affect mentors’ experience in both the case study presented here and the mentoring literature, suggesting how crucial it is for mentors to actually observe the impacts of their contribution, to alleviate the feelings of inadequacy that often beset them, provide ongoing support

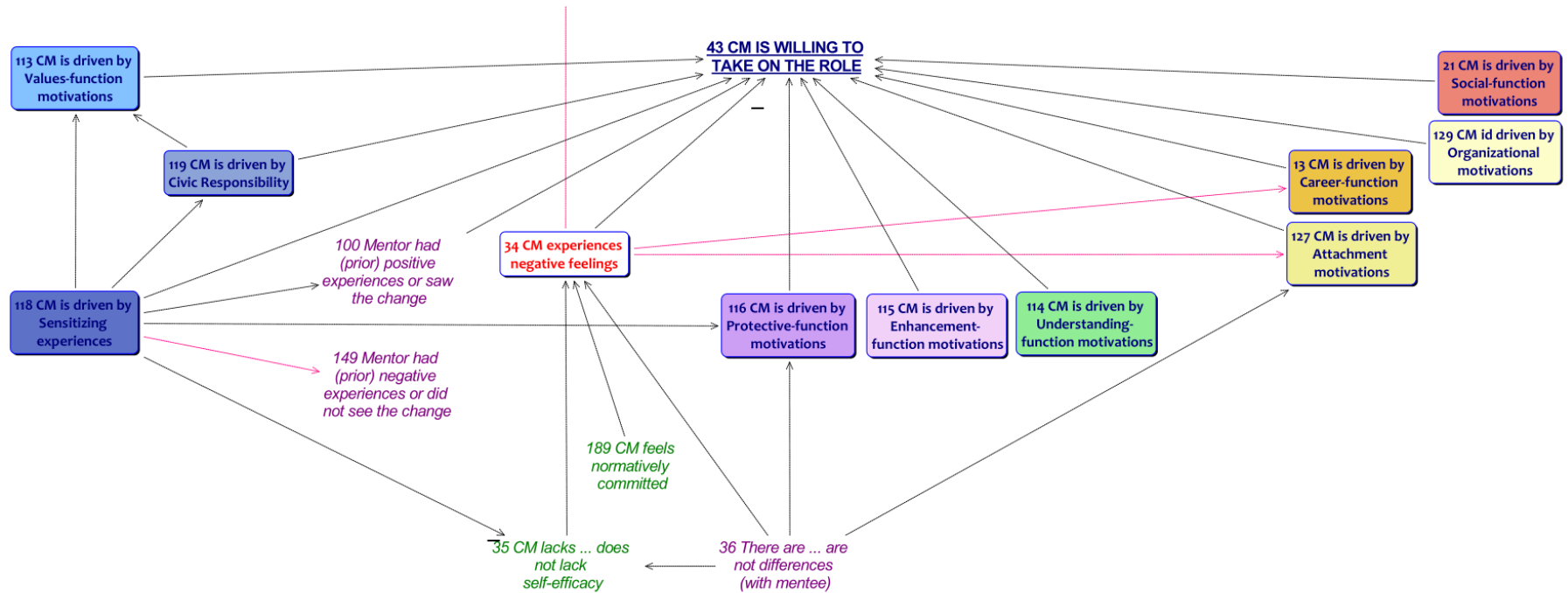
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<sup>18</sup> Considered congruent with the meaning of the VFI ‘Protective’ function, as pointing to a reduction of/escape from negative feelings and personal problems.

and carefully dose the degree of within-pair differences. Also, it is interesting to note that some negative emotional states (e.g., discouragement, demoralization, etc.) are an incredibly common outcome of mentoring, thus not representing an issue limited to this specific program. However, once again, the mismatch in the rankings of some items draws attention to factors found to play a more influential role within the program here evaluated, such as feeling hesitant about taking on the mentoring role or normatively committed to the MR.

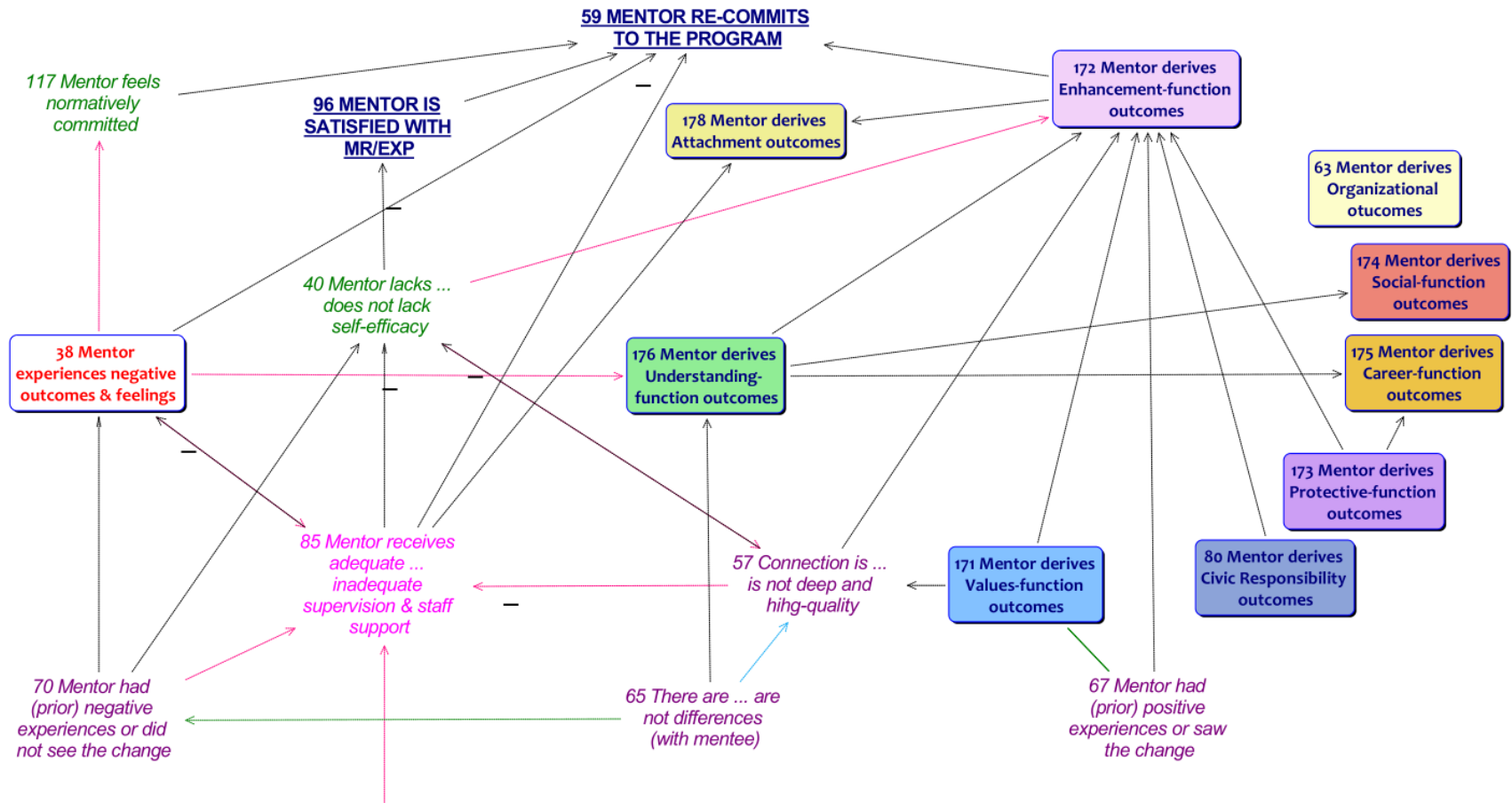
Focusing on the arrows, the numerous light blue lines crossing the extended version of the ToC (Appendix C) make extremely clear that several factors (e.g., the use of ice-breakers, a lesser emphasis placed on academic activities, within-pair dissimilarities, as well as meeting within the school or virtually, as mandated by the pandemic) may benefit the quality of the MR for some mentors and compromise it for others. This indicates that no one-size-fits-all approach exists in this regard. Hence, managers should not only convey loudly this message to mentors but should also support them in identifying the best way forward for every single MR initiated.

Figure 4 - 1 Decision to take on the role<sup>19</sup>



<sup>19</sup> CM = Candidate Mentor

Figure 4 - 2 Decision to re-commit



**Table 4 - 6 Domain analysis of ToC**

Ranking ToC		Ins	Outs	Tot	Ranking conceptual framework
1	Candidate Mentor/Mentor lacks/does not lack self-efficacy	<b>15</b>	7	22	6
2	Connection is/is not deep and high-quality	<b>14</b>	6	20	1
3	Mentor feels discouraged, demoralized, disheartened, sad, frustrated ...	<b>12</b>	5	17	4
4	Mentor had (prior) positive/negative experiences or saw/did not see the change	7	<b>10</b>	17	2
5	Mentor receives adequate/inadequate supervision & staff support	7	<b>9</b>	16	3
6	Mentor feels good (i.e., fulfilled, satisfied, rewarded or enjoyed)	<b>11</b>	2	13	-
7	Candidate Mentor feels hesitant, insecure, uncomfortable, fearful, threatened, apprehensive ...	7	6	13	-
8	There are/are not differences (with mentee)	1	<b>11</b>	12	9
9	Candidate Mentor/Mentor feels normatively committed	<b>10</b>	2	12	-
10	Candidate Mentor is driven by sensitizing experiences	<b>9</b>	2	11	-

Additionally, the Logic Analysis highlighted that, while the role played by mentee's parents or guardians in shaping mentors' experience is marginal in both the ToC and conceptual framework, interviewees more widely discussed the influence of school staff or other mentors. For instance, some prior studies (Caldarella et al., 2010; Fassetta et al., 2014; McGill, 2012; Slaughter-Defoe & English-Clarke, 2010) pointed out that interactions with fellow mentors – in the form of group development sessions – can enhance mentors' learning and overall experience. Within the current investigation, almost half of the mentors acknowledged how beneficial this has/would have been, promising themselves to engage more in the debriefing sessions organized, which ultimately can give: *“that feeling of not being the only one trying to solve a problem” [Phoebe]*. However, two major obstacles seem to be overcome: the additional time commitment required to participate and the negative group thinking that may take over during these gatherings, as Eloise described:

*“I always felt as though people treated them as an opportunity to just moan [...] maybe it was just the group that I was in [...] I always found that quite a difficult thing.”*  
[Eloise]

Also, some mentors spoke favorably about receiving even small expressions of gratitude from the teachers, feeling acknowledged for their time and efforts: *“[...] even the teachers actually came along [...] and they were very complimentary and appreciative of the support. So ... yeah, that's really helpful, I think” [Edwin]*. In other cases, the lack of interactions with the school personnel resulted in much less positive views:

*“In my experiences, with three different boys, in three different schools, there has not been much engagement between the staff and me, as a mentor. [...] I feel like sometimes the schools are taking advantage of the mentoring system, to grab themselves some spare time [...].” [Albert]*

Another topic largely unexplored by extant literature is the role played by mentors' family and friends, who can supply additional encouragement and reassurance with

respect to the mentoring endeavor. The Logic Analysis adds to our understanding in this respect, as all the volunteers who actively sought support from acquaintances while mentoring were those experiencing the greatest stress and anxieties (e.g., at the onset of the MR or dealing with its unexpected termination) and/or who felt less entitled to speak to the Program Coordinator.

Finally, unlike extant studies, the Logic Analysis brought out a pretty ambivalent narrative about the role that rules and safety standards play. Having clear norms and a highly structured program was often perceived by interviewees as a safeguard and reassuring factor. Nonetheless, at the same time, some mentors felt constrained, as the rules in place somewhat frustrated their desire to do more to help the mentee. Therefore, they really appreciated when some departures from established practices have been allowed, to make room for tailored solutions (e.g., half-day community outings overseen by the Program Coordinator, job orientation beyond the official “Talent Tasters”<sup>20</sup>, meeting after school hours, cadence of meetings varied to suit individual needs).

Sharing these findings with representatives from MCR Pathways did not result in changes to the program theory produced. Nonetheless, this step allowed to take note that, although the latter generally held up well in light of the literature, a number of aspects distinctively characterize this program and the profile of mentors it relies on, as well as that some elements of its design or implementation may require adjustments to maximize the gains mentors realize, as recapitulated and better discussed in the next paragraphs.

## **4.5 Discussion**

### **4.5.1 Contributions to practice**

The findings provided by this paper have significant practical implications, as they can be leveraged to offer mentoring program directors with a series of recommendations on how to recruit and retain growing numbers of volunteers willing to assist youth in need of extra support.

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<sup>20</sup> Sessions, organized by MCR, through which students visit the workplace of a number of business partners and receive insights into different professional paths and industries.

First of all, while the perspectives of direct beneficiaries have received considerably greater attention, the current study adds to the relatively scant research that explored the perceptions and actual experiences of a demographically diversified pool of mentors, providing important insights for better understanding what motivates individuals to volunteer within SBM programs and what can help retain their continued involvement.

Study participants not only discussed gains aligned with their original motives for mentoring (i.e., realized motivations) but also a wide range of unanticipated positive outcomes, so that stated gains, overall, outstripped both the reasons to volunteer and negative consequences experienced. Most importantly, according to mentors' self-reports, the positive outcomes perceived appear to be, in most of the cases, neither intentionally sought at the moment mentors signed up nor seen as a potential by-product of the experience. Results thus stress that, although the primary motivations that prospective mentors may perceive or report are likely to keep falling within the same prominent domains (e.g., "Values", "Community Concern"), outreach, awareness-raising and recruitment campaigns should aim at making interested individuals increasingly cognizant – from the very outset of the engagement/decisional process – of the wide spectrum of gains attainable, as this can add further compelling motives for getting involved. Also, with respect to participants' pathways into mentoring, the study highlights that these altruistic motives often do not operate on their own. Rather, they act in tandem with a variety of experiences that mentors had throughout their lives, which, as other scholars pointed out (Meltzer & Saunders, 2020; Rubin & Thorelli, 1984), can lay the ground for an interest in youth mentoring or make mentors feel endowed with capabilities that can contribute in a fruitful way. Equally interesting to note is that, to some extent, some interviewees' commitment stories resembled the redemptive narratives articulated by highly generative American adults (McAdams, 2006; McAdams et al., 1997) when prompted to give an account of their generative efforts (intended as "*a wide range of endeavors to promote the development and well-being of the next generation and the quality of the world within which the next generation will live*" – McAdams, 2006, p. 83). Indeed, not unfrequently, some painful early experiences (e.g., of poverty, inequality, deprivation, loss, neglect) provided the base for



triggering redemptive sequences. These usually transited through benefitting of a “blessing” (e.g., having a natural mentor) and culminated in a renewed confidence in one’s own abilities to help others and an increased impetus to leave – to the society and future generations – a positive legacy, expected to outlive the self. In sum, drawing attention to these elements when advertising mentoring opportunities may be conducive to anchoring organizational appeals to individual backgrounds and aspiring mentors’ lived experiences, igniting individuals’ generative attitudes and willingness to engage.

The study produced several insights not only into the motivational and outcome domains to leverage as to get a growing number of volunteers involved but also into the directions to follow in order to offer an increasingly rewarding experience, revealing that mentors would benefit from greater attention being awarded to prevent or address some specific challenges identified. In this respect, study participants often put forward interesting pieces of advice.

Some of these recommendations regarded, for instance, the match-making process, in its interaction with recruitment or training activities. Although not a widely raised issue, Sally felt less capable than a man would have been to help her male mentee work through some issues, concluding that greater participation from men should be sought. This also suggests that, in the absence of available/suitable male mentors, focusing on commonalities (in interests, backgrounds, personalities) while matching participants may become particularly crucial to the success of mixed pairs. This may also be the case with intergenerational matches. Additionally, even with some cautions – in light of the pitfalls that may characterize co-mentoring structures (e.g., Dolan & Johnson, 2009) – coordinators may consider to designate a vice-mentor with the desired expertise and life experiences, to assist with well-defined tasks or issues. Instead, as regards the possible lag between the completion of the training and the match-making process, addressing mentors’ need to refresh what learned before starting mentoring may simply require increasing the visibility of the online resources already available to them.

Focusing on the ongoing support and supervision offered, in some cases, mentors felt uncomfortable about requesting discussions with the Program Coordinator, a

problem that can be solved by including short, yet default and periodic catch-ups, especially for – but not necessarily limited to – novice mentors, as suggested by Celine:

*“[...] especially in the early weeks, it should have been kind of standard that, after each mentoring session, you have a phone call or a meeting with the coordinator established, just to talk through what happened at the meeting [...] I felt like maybe if there'd been a kind of automatic check-in point that would have eased that.” [Celine]*

Additionally, consonant with the results of prior research (e.g., Slaughter-Defoe & English-Clarke, 2010), the findings underscore how critical it is to prepare mentors well in advance for the closure of the MR and help them process it, especially if abrupt or they will not keep in touch with the mentee afterwards. Actually, match closure was found to be a considerable stressor not only when occurring beforehand, as mentors approaching the natural conclusion of a MR generally reported experiencing sadness over the anticipated separation from their mentees and often described the solutions found to alleviate this feeling (e.g., staying in touch). In other cases, also because of the greater difficulties introduced by the current pandemic, mentors were confronted with the prospect or reality of a premature withdrawal of the mentee from the program. This constantly resulted in the mentors experiencing feelings of extreme frustration, anger, helplessness or even shame or guilt, as if it were something to blame themselves for.

This brings us to the next vital recommendation: Program Coordinators should do all they can to mitigate mentors' inclination to blame themselves if things do not go as well as expected or there is no apparent positive impact. Furthermore, they should avoid at all costs to unintentionally add to such feelings, as happened to Vivian:

*“[...] I've found quite upsetting that, when I spoke to the organizer, she was very unhelpful, she wasn't helpful. I felt that she was quite defensive and [...] when I raised these concerns, I was sort of blamed for it, you know, like it was my fault.” [Vivian]*

Moreover, female mentors appeared to be far more prone to feel faulty, “*a bit of a fraud*” [Phoebe] or even “*a failure*” [Giselle]. Although the limited size of the study sample prevents from talking about gender differences in experiencing impostor feelings, future enquires may seek to ascertain if, in wider populations and similar contexts, women turn out to be actually more susceptible to them.

Equally relevant, interviewees’ words revealed that success stories, albeit inspirational, are not devoid of side effects, and may make mentors whose MR struggles to take off feel even worse. Hence, it is advisable that novice mentors are made fully aware of the challenges they may face which can help them formulate more realistic expectations and endure in the longer run (Madia & Lutz, 2004; Stukas et al., 2013). From a practical standpoint, program administrators may consider exploiting the training sessions to downplay the issue: other mentors can act as testimonials and describe the worst situations faced, possibly showing that difficulties are part of the game, rather than a fault, and can be positively overcome.

This introduces the following recommendation: escalating the opportunities for volunteers to seek advice and emotional support from fellow mentors. Congruent with other studies (Marshall et al., 2015; Raven, 2015), results from the current evaluation suggest how important it is to provide ample opportunities to interact with other mentors and support each other. Indeed, mentors tapping into this resource often results in a series of positive outcomes: from a greater openness toward people from diverse backgrounds and ability to deal with them, to alleviating any feeling of loneliness and isolation when facing certain struggles. Nonetheless, program managers seem called to remove two main barriers. First, mentors widely spoke about the difficulty to allocate time to this activity, which may indicate the need for providing more frequent but shorter sessions. Secondly, as also discussed by McGill (2012), moderators should carefully manage emerging group dynamics: while sharing concerns, frustrations or disappointments is key to lessening any distress and risk of burnout, a proactive and positive attitude should still permeate intergroup interactions.

With respect to the contact with school personnel, prior research has brought mixed results. While Aresi et al. (2021) found teacher support to be unrelated to mentors’

self-report of the MR quality, Raven (2015) saw these stakeholders as vital to the success of SBM programs, as their feedback can help mentors recognize improvements in the mentee's behaviors, attitudes or academic achievements, boosting their confidence and sense of accomplishment. Findings from the current study fall somewhere between these two extremes and indicate that the simplest expression of appreciation from educational staff can make the difference between feeling valued and neglected or taken advantage of.

Also, it is well-known that mentors – although unsatisfied – may feel pushed to persevere due to the desire not to let down the mentee (Aresi et al., 2021; Caldarella et al., 2010; Gettings & Wilson, 2014). This may be simply reflective of how strongly other-oriented they are or, alternatively, cast some doubts on the amount of personal benefits volunteers derived. Also, study participants seemed to seek support, encouragement and guidance from people close to them primarily when subject to an excessive emotional burden and/or when they perceived they had reduced access to discussions with the Program Coordinator. Attention should be paid by mentoring agencies and researchers to these two aspects, first and foremost to better understand if they actually represent early signs of distress and dissatisfaction or of dysfunctions to redress as to the relationship established with the Program Coordinator.

Finally, although the level of regulation and structuring of mentoring is far milder than for alternative approaches, the study revealed contrasting sentiments in this respect. While feeling backed up by a well-established code of conduct can be reassuring for the mentors, administrators seem encouraged to stay flexible and allow some departures from it, leaving some room for bespoke solutions, as highly appreciated.

#### **4.5.2 Contributions to research**

The present study adds to the relatively narrow body of mentor-centric literature and contributes substantially to the progress of the scientific knowledge in this research field.

As anticipated, the 17 pieces of qualitative empirical research from which the conceptual framework was derived (Bufali et al., 2021) purposely explored the

positive outcomes of participation relatively frequently (82% of the studies). Conversely, less extensive research has expressly focused on mentors' motives for volunteering (47%), the process factors and mechanisms influencing mentor initial and sustained commitment (41%) and, above all, the negative consequences mentors may incur (24%). Furthermore, only one contribution (Dolan & Johnson, 2009) has deliberately and holistically assessed all these four dimensions. The current study not only addressed both positive and negative outcomes, avoiding being lopsided in favor of either, but also richly describes the motivational and processual determinants most critical to the observed changes.

Also, an important step forward is represented by theoretically framing the assessment of mentors' motives and outcomes through an abductive process, thus refining the theoretical assumptions articulated a priori based on their fit with field evidence. Hereby, the study validated motivational or outcomes domains (e.g., "Values" motives or "Understanding" and "Self-enhancement" gains) already documented as prevalent in the mentoring field (Bufali et al., 2021). However, it makes original contributions by uncovering some novel categories which stand outside established theoretical frameworks (Clary et al., 1992) and are less explored or reported in extant studies, yet particularly salient in the context of the program being evaluated. These, for instance, include the community concerns or "sensitizing experiences" that led many interviewees to approach mentoring. Additionally, in concert with previous research (e.g., Coyne-Foresi et al., 2019; Dolan & Johnson, 2009; Limeri et al., 2019; McGill, 2012; Meltzer & Saunders, 2020), the study further evidences that mentoring often impacts other personal relationships in the mentors' lives. All this fresh evidence is informative not only as regards the collective narratives around mentoring in this specific research setting or, possibly, the backgrounds of the pool of mentors most drawn to this particular program but also with respect to interesting areas that future research could better address. Moreover, it further supports the case for deeming the VFI a too narrow instrument to account for all the functions served by mentoring (Teye & Peaslee, 2020; Bufali et al., 2021). The analysis relied on qualitative data to provide rich insights into the varied range of mentors' motivations and outcomes, describing the content domain of these dimensions of mentors' experience. Future studies can build on this

groundwork to design *ad hoc* survey measures or probe the applicability of pre-existing ones with a view to quantify the key constructs and links emerged (Appendix C).

Equally important, the study raises several novel evaluation questions. Although the variety of positive impacts documented is reassuring, the Logic Analysis evidenced a number of potential negative outcomes and feelings associated with the mentoring experience. Given the paucity of research directly examining these fallouts of participation, more exploration seems highly warranted. Similarly, as anticipated, there remains a need for continued research addressed to explicitly articulate the processes at work that may explain how outcomes – either positive or negative – result. In this respect, the Logic Analysis provides some clarifications about the numerous factors that may influence the initial decision to volunteer, the outcomes accrued, as well as the intent of mentors to renew their commitment to mentoring. It also sheds light on meaningful directions for future research, such as more thoroughly investigating potential gender effects in the exposure to impostor feelings or better structuring the understanding of the role played by teachers, mentors' acquaintances or normative commitment.

Moreover, the study develops a common framework to build on both the evidence yielded by current scientific knowledge on mentor experiences and the fieldwork conducted, putting forward a modelling approach that can be leveraged by other mentoring agencies to evaluate their own schemes. It is believed that the composite theory-building process adopted in this research offers several advantages over alternative practices. For instance, the knowledge synthesis embedded in the tables clearly showed the discrepancies between the program being evaluated and the wider pertinent literature. In consequence, a number of “development opportunities” (Deane & Harré, 2014) were revealed, such as more explicitly representing mentoring as a way to answer community concerns or capitalize on one's own past experiences, as well as increasing the chances for mentors to develop friendships or sentiments of belongingness. Also, the specific role played in this context by teachers, mentors' acquaintances and normative commitment was so exposed. Additionally, albeit aware that more linear and parsimonious models (McGill et al., 2015; McGill, 2012) may be more attractive to end users, cognitive mapping

provided a very detailed representation of the mentoring process (Appendix C), displaying how discrete processual elements influence each other and when/how to intervene to achieve the intended outcomes. This approach also helps uncover and incorporate potentially diverging perspectives, narratives and representations of study participants about how the program is supposed to work (e.g., light blue arrows). In conclusion, both the instruments employed for knowledge synthesis serve as a platform to assess the legitimacy and coherence of a program-specific ToC against the academic literature. Precisely because of this systematic comparison we can gain a sound understanding of whether and to what extent the design/implementation of a program diverges from the standards endorsed by pertinent literature, potentially highlighting its strengths and weaknesses, as well as the corrective actions addressed to maximize its impact potential.

#### **4.5.3 Limitations and directions for future research**

The study also has limitations and some sources of bias that should be considered when interpreting its findings or conducting fresh evaluations, which may take the suggested steps to mitigate them.

Firstly, as with qualitative and non-positivist research, the size of the study sample was not set striving for the generalizability of results, but rather for “complexity, originality and specificity” (Dubois & Gadde, 2014). As such, while the matrices give a sense of the relative prevalence or salience of each concept, making inferences about the trends in the larger population of MCR mentors or gender/age differences solely based on these counts would be inappropriate. Future studies can replicate the analyses and challenge the conclusions drawn by involving larger, more representative samples.

Secondly, as mentors invited to participate could opt out from the study, the views elicited may be skewed, as likely to be generally positive. Nonetheless, the study strived to give exposure to a wide range of mentors’ experiences, intentionally selecting participants according to characteristics (particularly, service or match length or mentee’s status) likely to translate into grater challenges faced. Forthcoming investigations may attempt to further counteract this selection bias by involving case managers (in this case, the Program Coordinators) in the recruitment

of study participants, so as to pick interviewees who were both known to have encountered particular issues during their path and not to have done.

Thirdly, participants were interviewed at one point in time, which may have resulted in some difficulties to provide a precise and exhaustive account of their entire mentoring journey. Especially regarding the reporting of initial motives for participation or the early stages of the experience, recall bias could have been at work. Nonetheless, probes and prompts directly brought to the attention of respondents a set of anticipated motivations, outcomes and factors they may have struggled to recall. However, future research would benefit from longitudinal designs, gathering information before mentors engage in the process. Additionally, the timeframe during which data were collected is relevant also because the Covid-19 pandemic is likely to have influenced the amount and nature of the challenges or outcomes perceived, as the following interview extract suggests:

*“I really enjoy it [...] especially at the moment where, you know, working from home all the time, you don't get to talk to many people. It is really nice to speak to my mentee.”*  
[Celine]

Fourthly, the study rests on participants' self-reports, opening doors to social-desirability bias: interviewees may have provided responses considered more socially acceptable, which may result in a flattening of reported themes. This particularly applies to the exploration of behavioral intentions, as individuals may have felt encouraged to place particular emphasis on altruistic motives for volunteering or overstate their intent to follow through. Nonetheless, following Shye's (2010) tips, in order to alleviate this bias, the questions initially referred to the broader category of mentors and, only subsequently, to the interviewee's personal experience.

Finally, the first author autonomously performed the thematic analysis and interpreted how the process components identified could fit together in a coherent ToC. Reliability and credibility of interpretations were primarily established by sharing preliminary findings with program managers, who provided feedback to establish the validity of the sense-making process undertaken, the verisimilitude of results and appropriateness of the proposed program theory. However,



supplementary materials<sup>21</sup> have been prepared which provide a depth of data such that any interested reader can independently scrutinize and make an informed judgement on how data were analyzed and interpreted.

#### **4.6 Conclusions**

The research reported here offers insights of great interest for program practitioners and evaluation researchers concerned with volunteer management within SBM programs. The study not only makes a convincing case to contribute time or financial resources to SBM programs but can also help to inform the work of those designing and conducting fresh evaluations in this field. Ultimately, PTDE, as the one here illustrated, can enhance the effectiveness of the management practices adopted by mentoring organizations to recruit and retain volunteers, maximizing the chances that they – like mentored youth – reap the desired benefits.

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<sup>21</sup> Currently available on request. It is envisaged to locate them in an external repository upon publication of the manuscript.

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## **Chapter 5: Putting the mentor experience into context: a mixed-method cross-cultural study**

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## **5.1 Introduction**

School-based mentoring (SBM) is burgeoning across the globe to promote the personal development, social inclusion, attainment and retention within the educational system of vulnerable young people. Indeed, although the USA still keeps its primacy, this practice also expanded in most of English-speaking countries (namely, the United Kingdom, Canada, Australia, New Zealand), Middle Eastern and Asian countries (i.e., Israel, Hong Kong) and Europe (such as, Spain, Italy) (DuBois & Karcher, 2005; Goldner & Scharf, 2013; Preston et al., 2019). Nonetheless, little attention has been paid, so far, to the experiences of volunteer mentors (Bufali et al., 2021), especially when it comes to understand what drives the mentor's decisions to commit to and stick with a SBM program in differing socio-cultural contexts.

To address this need, the current study uses a mixed-method design to explore the perspectives of the volunteers who mentored within the SBM programs provided respectively by MCR Pathways (MCR), in Scotland, and Società Umanitaria (SU), in Italy. It first reviews extant mixed-method studies that dealt with the drivers of initial and ongoing mentors' commitment to SBM, delineating our contribution to published literature. Second, once described the research setting and participants, it outlines how data collection and analysis were carried out. Third, findings are illustrated, emphasizing similarities and discrepancies in Scottish and Italian mentors' self-reports with respect to the: motives for getting involved; positive and negative outcomes of participation; factors influencing their experience. Finally, the study key implications, as well as its main limitations, are elucidated.

## **5.2 Background**

Whilst the body of mentor-centric literature is, per se, relatively underdeveloped (Bufali et al., 2021), very few studies adopted mixed-method designs to explore the experiences of those who mentor at-risk youth within SBM programs. These enquires – though limited in number – yielded some evidence as to the broad range of anticipated or realized gains of participation (Figure 5 - 1). For instance, altruistic reasons for participating are among those most widely endorsed by study participants (Schmidt et al., 2004; Wasburn-Moses et al., 2014). Often participants also wanted to gain a deeper understanding of the developmental needs of youth, or saw mentoring

as a way to broaden one's own horizons, re-evaluate priorities or learn how to be positive role models (Hughes & Dykstra, 2008; Schmidt et al., 2004; Wasburn-Moses et al., 2014). Commonly, more self-interested reasons for getting involved were mentioned as well, such as: having fun (Monk et al., 2014), gaining personal satisfaction (Schmidt et al., 2004), increasing self-confidence in dealing with others or developing friendships (Hughes & Dykstra, 2008; Wasburn-Moses et al., 2014). Similarly, student mentors' frequently anticipated benefits related to their academic endeavors or career prospects (Hughes & Dykstra, 2008; Monk et al., 2014; Schmidt et al., 2004). Nonetheless, being a mentor could also afford the opportunity to give back, either by contributing to creating a better society or by paying forward the mentoring formerly received (Monk et al., 2014; Wasburn-Moses et al., 2014).

At the same time, within these studies, participation was often found to result in the development of greater awareness of what fosters positive youth development (Schmidt et al., 2004; Wasburn-Moses et al., 2014). Mentoring solicited self-reflection about the disadvantages that underprivileged young people can experience as well, pushing mentors to think and deal with others differently (Hughes & Dykstra, 2008; Lee et al., 2010; Schmidt et al., 2004). Moreover, mentors reported positive changes as to a number of relational outcomes and abilities (Lee et al., 2010; Wasburn-Moses et al., 2014) or felt they learned something about their personality (Schmidt et al., 2004). Additionally, volunteers often got out an overwhelming sense of fulfilment, achievement and even pride from the recognition of the positive impact made (Hughes & Dykstra, 2008; Monk et al., 2014), enjoying the opportunity to develop mutual understanding with protégés and close MRs (Lee et al., 2010; Monk et al., 2014; Schmidt et al., 2004). Also, the development of friendships or of a sense of camaraderie within the mentoring team (Lee et al., 2010; Monk et al., 2014; Tierney & Branch, 1992), greater self-esteem and perceived scholastic competence (Tierney & Branch, 1992) or experience instrumental to their envisaged career (Wasburn-Moses et al., 2014) turned out to be benefits of participation. Finally, participation provided an outlet to give back (Monk et al., 2014) and develop a newfound understanding of community needs, which spurred greater civic engagement (Lee et al., 2010; Schmidt et al., 2004).

**Figure 5 - 1 Evidence synthesis**

	<b>MOTIVATIONS – Desire to:</b>	<b>OUTCOMES – Gains in terms of:</b>
<b>Values</b>	<ul style="list-style-type: none"> <li>- do something worthwhile;</li> <li>- bring about a positive change;</li> <li>- helping youth with behavioral/academic issues.</li> </ul>	
<b>Understanding</b>	<ul style="list-style-type: none"> <li>- understand youth developmental needs;</li> <li>- broaden one own’s horizons;</li> <li>- learn how to be positive role models.</li> </ul>	<ul style="list-style-type: none"> <li>- consciousness of youth disadvantage;</li> <li>- relational skills;</li> <li>- self-awareness.</li> </ul>
<b>Enhancement</b>	<ul style="list-style-type: none"> <li>- have fun or gain personal satisfaction;</li> <li>- increasing one’s own self-confidence;</li> <li>- establish new friendships.</li> </ul>	<ul style="list-style-type: none"> <li>- sense of fulfilment, reward, pride or enjoyment;</li> <li>- self-esteem;</li> <li>- relations/sense of camaraderie within the group.</li> </ul>
<b>Career</b>	<ul style="list-style-type: none"> <li>- supplement/apply classroom learning experiences;</li> <li>- acquire teaching skills;</li> <li>- explore potential career options.</li> </ul>	<ul style="list-style-type: none"> <li>- improved scholastic competence;</li> <li>- expertise/skills instrumental to envisaged career.</li> </ul>
<b>Others</b>	<ul style="list-style-type: none"> <li>- give back to/better the society;</li> <li>- pay forward the mentoring formerly received.</li> </ul>	<ul style="list-style-type: none"> <li>- contribution made to address societal needs;</li> <li>- wider civic engagement.</li> </ul>

Despite the richness of these preliminary findings, significant gaps exist in extant literature. Indeed, the handful of studies that explored, through mixed methods, SBM impacts on the volunteers themselves all focused on student mentors, so that little is known on how to boost the commitment of demographically more varied groups. Most importantly, cross-country cultural variations in mentoring practices and outcomes are not explored.

Although the literature review offered by Goldner & Scharf (2013) does not specifically focus on mentors’ experiences and perspectives, it clearly shows that socio-cultural superstructures affect how youth mentoring is conceived, implemented and experienced in a number of ways. More specifically, while individualist societies are more likely to intend mentoring as directed to promote mentees’ self-determination or empowerment, sense of competence and autonomy, collectivistic ones see it more as a vehicle to satisfy relatedness needs and enhance youth social cohesion or attachment to community (Goldner & Scharf, 2013; Preston et al., 2019).

Moreover, in family-centered cultures, greater efforts may be required to legitimize the mentor role and individuals may be less at ease if mentoring entails the disclosure of one's most intimate feelings and personal matters, beyond the provision of instrumental forms of support (Goldner & Scharf, 2013; Molpeceres et al., 2012). Finally, it was underscored (Goldner & Scharf, 2013) that, in egalitarian cultures, MRs that are more reciprocal and symmetric, conceived in terms of friendship, and that favor youth-driven decision-making may be most valued. Conversely, in hierarchical cultures, mentors may be less familiar with allowing mentees to take the lead or more prone to adopt prescriptive approaches. Other variations are attributable to the welfare regime characterizing a country. For instance, where the state is less engaged in the provision of welfare services (i.e., liberal regimes), altruistic reasons to volunteer can be more prominent (Hustinx et al., 2010; Hwang et al., 2005).

In this respect, although within-country variations exist, the two European countries considered in the current study can be seen as representative of fairly different cultures and welfare regimes. The UK embodies a liberal welfare regime (Salamon & Anheier, 1998) and is amongst the most individualist societies (surpassed only by the USA and Australia), has weaker family ties and lower tolerance for power distance (Hofstede Insights, 2021b). In contrast, and comparatively, Italy has a less individualistic and more hierarchical culture (Hofstede Insights, 2021a), connoted by a strong family ethos. Although these cultural differences are not such that to lead us to consider Italy a collectivist and strongly hierarchical society, the relative gap between the two countries can nonetheless result in subtle variations in the directions described above. If this were the case, as opposed to Italians, Scottish people can be assumed to be more likely value-driven as volunteers, more averse to social relations based on hierarchy and apt to conceive MRs as friendly relationships between equals. Also, they may be more prone to accept the involvement of non-familial actors in youth development or let MRs be youth-driven and primarily directed towards promoting youth self-empowerment.

Along these lines, the study will primarily seek to address the research questions that follow: do adult volunteers, in Scotland and Italy, experience being mentors of vulnerable youth differently? With which implications for mentoring practice and research?

## 5.3 Methods

### 5.3.1 Research setting and participants

Within these two broader cultural settings, we focused on two SBM programs, respectively offered by the charities MCR in Scotland (UK) and SU in Italy. The former was set up in Glasgow, in 2007, to serve vulnerable secondary school students, with approximately 60% of its beneficiaries looked after by local authorities (MCR Pathways, 2017). The latter SBM scheme, instead, was included, starting from 2003, in the wider portfolio of social-cultural activities that SU offers. Introduced in five Italian cities, it targets elementary or middle school students considered, for several reasons, at risk of disengaging prematurely from education. One-to-one MRs with adult volunteers are established to help pupils acquire confidence in themselves, others and their future prospects, discover their talents and fully realize their potential through education. In both the cases, mentor recruitment and training are handled by program managers, whereas the match-making process is carried out in collaboration with on-site Program Coordinators, for MCR, and professional psychologists, for SU. The two models entail that local delivery and daily operations are overseen by the Program Coordinators, flanked – for SU – by a spokesperson for mentees’ teachers. Mentoring pairs meet, for at least one academic year, once per week through one-hour sessions, usually held on the school’s premises. However, due to the outbreak of the Covid-19 pandemic, meetings have been temporarily held virtually (in the case of MCR), or suspended (in the case of SU).

In total, 20 adult volunteers (MCR  $n = 12$ ; SU  $n = 8$ ) were invited to participate in semi-structured individual interviews. For MCR, the sample composition reflects the proportions characterizing the whole population of active<sup>22</sup> mentors in Glasgow across most of the dimensions considered, such as: mentors’ gender and age; mentees’ vulnerability and schools’ characteristics. As to SU, proportional quotas were used as to mentors’ gender, age and city of reference (Milan, Rome, Naples), whereas, for the remaining dimensions (namely, service and match length, mentees’ vulnerability and level of education), the sample is half split. Appendix A provides

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<sup>22</sup> Namely, those who have already taken part in a MR, even if the most recent one has ended.

further details on the characteristics of interviewees, identified hereafter using pseudonyms. Concurrently, larger samples of active mentors were invited to complete an online questionnaire (Appendix B). For MCR, the analytic sample comprised 42 mentors operating in Glasgow. Of them, 60% were females and 36% males. Additionally, 21% were respectively in the age groups under 40 and 41-55, whereas 26% in the categories 56-64 or 65+. For SU, we retained responses from 72 mentors, operating in: Milan (56%); Naples (31%); Trento (10%) and Rome (3%). Of them, 57% were females and 31% males. All mentors were over 40, with 6% in the age group 41-55, 19% in the category 56-64 and 74% with 65 years or more.

### **5.3.2 Data collection**

This mixed-method study, approved by the University of Strathclyde Department of Management Science Ethics Committee, adopts a concurrent convergent or triangulation design (Cresswell et al., 2003), so that data on the same phenomenon have been collected, at the same time, with two separate methods. Findings from qualitative analyses will allow formulating hypotheses to be further validated through the use of the quantitative dataset, so as to substantiate the interpretation of interview data. The sets of findings generated by both the methods will be then combined using two data integration approaches (Johnson et al., 2019): i) data conversion (transforming qualitative evidence into numerical counts, based on the frequency with which each sub-theme was discussed by interviewees); joint display techniques (tabulating the two sets of results in parallel). This will allow checking for agreement between sub-sets of findings, producing one summative result.

In terms of data sources, first, participants were interviewed through video or phone calls, lasting on average about one hour, to elicit their subjective perceptions about:

- how they conceived and would symbolize their role/experience;
- what motivated them to become mentors;
- which positive and negative outcomes were experienced;
- which factors facilitated or hampered their experience.

Second, as part of a wider survey, a questionnaire used several validated scales to measure relevant constructs. Mentors' *initial motivations for volunteering* were

measured through a reduced model of the “Volunteer Functions Inventory” (Clary et al., 1998), as validated by Teye & Peaslee (2020). The 11 items of the one-factor “Mentor Self-efficacy” scale (Ferro, 2012) provided a retrospective account of mentors’ *self-perceived confidence* in their ability to mentor at the moment they joined the SBM programs. The measurement of *perceived program support* followed the “Mentor Training Satisfaction” instrument (Ferro, 2012), although adding an item to cover an area of support not included in the original scale (socializing, networking and community-building or SNCB activities). *Positive outcomes* were measured by 6 items, as in the original version of the VFI (Clary et al., 1998), reworded following the mentor-specific application developed by Caldarella et al. (2010). As to *negative outcomes*, the three negative items of the “Emotion” scale assessed how emotionally draining, frustrating and disappointing the volunteering experience was, while the assessment of mentors’ *overall satisfaction* with the experience used a single-item 7-point Likert-type scale (Stukas et al., 2009). Finally, integrative items were included to assess:

- respondents’ desire to volunteer to give back to the community (Ferro, 2012; Teye & Peaslee, 2020);
- the potential obstacles and difficulties faced during the mentoring experience (Martin & Sifers, 2012; McGill et al., 2015; Harris & Nakkula, 2008; Rubin & Thorelli, 1984);
- the extent to which normative commitment to the MR, intended as a sense of obligation to carry it forward to avoid letting down or harming the mentee, explained a high intention to mentor again in the near future in the presence of low overall satisfaction (Caldarella et al., 2010).

Information was also gathered about respondents’ standard socio-demographic characteristics and length of experience as mentors. Full information on the translation of instruments, properties of inventories and data missingness can be found in Appendix B.

### **5.3.3 Data analysis**

The thematic analysis of interview transcripts was approached with a set of pre-defined, theory-driven codes, then iteratively refined to incorporate emerging



concepts. An initial frame – grounded in the functional approach to understanding individuals’ helping intentions and behaviors (Clary et al., 1992, 1998) – guided the conceptualization of the motives and positive outcomes of mentors’ participation. Nonetheless, other sources (Ferro, 2012; McGill et al., 2015; Stukas et al., 2009; Teye & Peaslee, 2020) provided the grounds for including provisional themes as to motives and benefits beyond those traditionally considered in the Volunteer Functions Inventory (VFI), the negative outcomes possibly experienced by mentors and the barriers and facilitators of the mentoring experience (Martin & Sifers, 2012; McGill et al., 2015; Harris & Nakkula, 2008; Rubin & Thorelli, 1984). Data conversion was executed, so that matrices (Appendix A) show the frequency with which sub-themes (rows) were discussed by interviewees (columns). Quantitative analyses relied, instead, on a set of statistical tests, depending on the hypotheses formulated from the interview data. While chi-square tests were used to detect significant differences in proportions, independent-samples Kruskal-Wallis tests determined statistically significant differences in distributions across groups and Wilcoxon matched-pairs tests compared scores expressed by the same respondent. Regressions (multiple linear, multinomial logistic or ordinal logistic) were then used to further investigate relevant relationships, usually including mentor’s gender, age and months of experience in the role as controls (if not differently specified). Full details about assumption testing and regression analysis results are provided in Appendix B.

## **5.4 Findings**

### **5.4.1 Mentor Role: symbols, metaphors and definitions**

The symbols, metaphors and definitions through which study participants described their role, MR or overall experience (Appendix C) clustered in varied conceptual categories.

The first two groupings of symbolic/metaphoric items tend to focus on the volunteer, either describing the mentor role or the experience and growth process the volunteer mentor went through. For instance, some mentors – from differing countries and genders – chose songs that captured the functions performed as mentors, which ranged from encouraging and reassuring the mentees to taking care of them. Others,

mostly males, spoke about the difficulties they encountered while mentoring or the process of attunement they went through to adapt their manners to the behavioral patterns and needs of a young person. For instance, while Bernie learned to tone down his manners, becoming soft as a “*feather*”, Sara – mentor of a hyperactive child – tried to transform into a “*clown*”. We also find cases characterized by a dual focus on both the individual volunteer and the pair. For instance, Patrick described the ups and downs of mentoring, compared to reading a book: at times, the readers may not like or even understand what they are reading. Nevertheless, they work their way through this journey, getting to its end. The third and fourth category – populated by female mentors, from both countries – entirely focused on the pair. First, some participants selected images/objects reflecting features of the MR, such as its transformational power, richness or reciprocity. Others rather described specific activities representative of the moment when the MR became more friendly, the mentor was thanked or some difficulties overcome. Finally, some older female mentors, described mentees’ growth, comparing their protégées to something delicate, meant to fly away (like a “*dove*”) or flourish (as a “*planted seed*”). Interestingly, while male mentors – from both Scotland and Italy – concentrate in the categories entirely or partially focused on the volunteers themselves, the items describing the relationship or mentees’ growth were mostly chosen by females.

Definitions of what being a mentor means were equally varied. In the first two categories, the mentor role is primarily associated with the provision of emotional support. For instance, six mentors – all Italian but one – described the mentor as a friend or travel companion, emphasizing how they reduced power distance by: “*levelling the playing field*” [Amanda], being “*on their ground*” [Rupert] or “*on an equal footing*” [Jane]. Along this line, others – all Scottish and mostly females – believed that a mentor is simply someone who’s there to listen, take an interest in what mentees go through and provide that dedicated attention that youth may lack. Conversely, some Scottish male mentors rather intended their role as directed at providing instrumental support or, more often, promoting mentees’ self-empowerment, helping the mentees to want to help themselves [Bernie] or take the lead [Patrick]. Another noteworthy category, which encompasses definitions from both Scottish and Italian females, refers to the provision of guidance by mentors,

whose function is to bring to the table life experiences, perspectives and stimuli different from those mentees are exposed or used to, encouraging them to explore new paths. By contrast, while a female Italian mentor [Sara] emphasized mentors' duty to remove their personality from the equation, for another [Lily], mentoring was more about self-expression. It is striking the number of oppositions these definitions imply, such as between: emotional and instrumental support; letting find and providing direction; bringing to the table or expressing one own's self and stepping back.

#### **5.4.2 Motivations and Positive Outcomes**

Starting from interview data, as can be seen at Table 5 - 1, there is a general alignment as to the ranking of the motivational or outcome domains most frequently cited. In terms of total occurrences of VFI functions, in both samples, "Understanding" turned out to be the most reported one, followed by "Enhancement", "Values" and "Protective", although the latter is particularly prominent as an outcome of participation for Scottish mentors. Nonetheless, some subtle differences do exist, especially when considering discrete sub-themes (Appendix A). When explaining how mentoring enhanced their understanding, both Scottish (67%) and Italian (50%) interviewees described how being mentors helped them grow their skill sets, developing greater openness to others [Amanda], patience [Edwin, Patrick] or active listening abilities [Lily, Patrick, Bernie]; becoming more sensitive and attentive when dealing with people with differing views, characters or backgrounds [Lily, Eloise, Celine]; learning to calibrate self-disclosure [Giselle]; or, as anticipated, how to adapt their manners and behaviors [Sara, Jane, Bernie]. Another widespread outcome, particularly for Scottish mentors (50%), was having gained new perspectives or overcome some preconceptions. This, for instance, happened to Pam, who completely changed her views of Roma, or to Sally, about youngsters in general:

*"I've had a very low opinion of [...] the way the children behave [...] they're like a gang ... and again you get this bias and this prejudice. Then, [...] it becomes no frightening any more, it's just kids. [...] they're not this big massive gang of*

*lunatics! So, yeah, I think you put things into perspective  
[...]*". [Sally]

It has, nonetheless, to be noted that, unlike Scottish mentors, Italians cited such an "Understanding" function more frequently as a motive for getting involved as well.

As to the "Enhancement" theme, another outcome overwhelmingly reported by both Scottish (83%) and Italian volunteers (88%) is the sense of reward and satisfaction gained from: seeing the mentee making progress (for instance, in terms of educational attainment [Rupert], transition to higher level of education or the job market [Sally, Albert], responsiveness and conduct displayed at school [Lily], talkativeness and willingness to open up and trust the mentor [Giselle, Phoebe] or maturity [Amanda]); knowing that you've helped someone [Eloise, Sally, Edwin, Pam]; being acknowledged by teachers [Anne]; or, uniquely for Italians, having fun by playing [Amanda, Anne]: *"Clearly it's fundamentally a game-based dynamic. [...] And so, by playing, you have fun [...] you basically go back to being a child [...]"* [Amanda]. Interestingly, "Enhancement" turned out to be more commonly a motivation to volunteer among Italians, with some of them [Rupert, Anne] specifying that their decision to become mentors was truly not about the desire to be useful to others: *"I mean, I'm not a 'good person'! At least, I don't feel like that, [...]. I am not inclined to doing good, I must tell the truth! I do it when I like it too, when I enjoy it too"* [Anne].

The "Protective" function mentoring can serve (e.g., escaping from loneliness, guilt, everyday troubles and routines), was more prominent among Scottish mentors. Interestingly, though, the benefit of evading a demanding work or private life – albeit much more common among Scots (25%) – was reported also by a working Italian mentor, who told that, as opposed to: *"[...] your everyday life – where you're task-oriented, [...] – there you [...] are free to play and therefore it's a break"* [Amanda].

**Table 5 - 1 Incidence of selected themes (qualitative evidence)**

	Themes	As a motive		As an outcome		Total	
		Scotland	Italy	Scotland	Italy	Scotland	Italy
<b>VFI</b>	<b>Understanding</b>	1	6	21	13	22	19
	<b>Enhancement</b>	1	5	19	11	20	16
	<b>Values</b>	6	8	6	6	12	14
	<b>Protective</b>	4	2	5	1	9	3
	<b>Career</b>	2	0	7	0	9	0
	<b>Social</b>	1	0	2	0	3	0
<b>Add.</b>	<b>Civic Concern</b>	7	4	1	0	8	4
	<b>Sensitizing exp.</b>	15	10	0	0	15	10

Mentors' self-reports also pointed to themes other than those traditionally included in the VFI. Particularly Scottish mentors (50%) saw their volunteering as a means to give something back to the community, acting as drivers of change. Among Italians, this intertwined with the desire to promote social justice and mobility (25%). Interestingly, for both samples, the motive reported the most pertains to some prior "sensitizing" experiences that increased mentors' sensibility or preparedness for mentoring at-risk youth. Indeed, many interviewees approached mentoring because they previously benefitted from a mentor [Bernie, Eloise, Diane], were employed in helping professions [Diane, Vivian, Rupert, Pam] or had an experience akin to youth mentoring, such as volunteering at child helplines [Patrick, Eloise, Lily].

The first hypothesis that survey data will validate or reject is that:

- Hypothesis 1. "Understanding" and "Enhancement" motives will be more salient within the Italian sample, whereas the desire to give back to the community among Scottish mentors.

As summarized at Table 5 - 2, the Kruskal-Wallis test performed confirmed this proposition, showing that there were strongly statistically significant differences in these motives' scores between the two samples ("Understanding":  $\chi^2(1) = 9.867, p = .002$ , with a mean rank score of 63.96 for SU and 44.07 for MCR; "Enhancement":  $\chi^2(1) = 36.258, p = <.001$ , with a mean rank score of 69.88 for SU and 32.21 for MCR; "Give back":  $\chi^2(1) = 8.331, p = .004$ , with a mean rank score of 62.54 for MCR and 45.70 for SU). Separate multiple linear regressions were calculated to predict the extent to which respondents were driven by "Understanding" and "Enhancement" motivations based on their reference country (and controls). In both cases, mentors' country was the sole significant predictor and the importance attributed to each motive respectively increased of 0.998 and 1.906 when respondents belonged to the Italian organization. For the latter motive ("Give back"), a multinomial logistic regression modeled the relationship between the predictors (country of reference and controls) and membership in the four clusters that rated this motive as "Scarcely", "Moderately", "Very" or "Extremely" important. Set the "Scarcely" cluster as the reference group, pairwise comparisons show that being an Italian mentor significantly predicted ( $p = .015$  and  $.023$ ) a lower probability to rate this motive as "Very" or "Extremely" important (OR = 0.135 – 95% CI 0.027-0.673; OR = 0.132 – 95% CI 0.023-0.752).

Second, we hypothesized that:

- Hypothesis 2. ego-defensive and career-enhancing outcomes will be more salient among Scottish mentors.

In this respect, the Kruskal-Wallis test shows that "Protective" benefits are reaped significantly more by Scottish mentors ( $\chi^2(1) = 5.969, p = .015$ , with a mean rank score of 62.59 for MCR and 47.99 for SU). There is also strikingly convincing evidence that career-related benefits are significantly more strongly perceived among Scots ( $\chi^2(1) = 27.379, p = <.001$ , with a mean rank score of 71.37 for MCR and 40.20 for SU), not surprisingly, given their younger age. However, ordinal logistic regressions showed that, when accounting for control variables, country of reference was a significant predictor only of career-enhancing benefits ( $p < .001$ ), with Italian

mentors having a significantly lower probability to reap benefits in this domain (OR = 0.354 – 95% CI 0.200-0.626).

Finally, it is worth highlighting that the only two motivational domains where Scots had mean ranks higher than their Italian counterparts are those more other-oriented (namely, “Values” and “Give back”). Additionally, except for “Values”, while Italian mentors’ scores for positive outcomes are generally lower than those of corresponding motivations, the opposite applies to the Scottish sample.

**Table 5 - 2 Statistical tests (quantitative evidence)**

	MOTIVATIONS			POSITIVE OUTCOMES		
	Scotland	Italy	Sig.	Scotland	Italy	Sig.
	Mean Ranks			Mean Ranks		
Career	39,65	60,87	<b>0,000</b>	71,37	40,20	<b>0,000</b>
Social	49,88	60,47	0,093	63,54	48,31	<b>0,008</b>
Values	72,74	46,76	<b>0,000</b>	65,21	48,85	<b>0,007</b>
Protective	45,23	58,18	<b>0,031</b>	62,59	47,99	<b>0,015</b>
Understanding	44,07	63,96	<b>0,002</b>	59,79	52,11	0,199
Enhancement	32,21	69,88	<b>0,000</b>	69,13	43,64	<b>0,000</b>
Give back	62,54	45,70	<b>0,004</b>	-	-	-

### 5.4.3 Negative Outcomes and Feelings

A general alignment was found in the ranking of adverse emotional states interviewees cited the most (Appendix A). Sentiments of hesitation, fear, apprehension, worry or concern were reported by 58% of the Scottish mentors and 50% of the Italian ones. Also, in both cases, half of the sample described feelings of

discouragement, sadness, frustration or emotional drain. Overall, such self-reports were evenly distributed (84% of MCR mentors and 88% for SU). Thus, survey data will help confirm that:

- Hypothesis 3. an equal share of respondents in the two samples will report to have experienced negative emotions and of comparable intensity.

The chi-square test performed established that there was no significant difference in the proportions of Scottish and Italian respondents that deemed their experience – from somewhat to extremely – emotionally draining, frustrating or disappointing ( $\chi^2(1, N = 114) = 0.72, p = .397$ ). The non-significance and mean ranks of the Kruskal-Wallis test also confirm the balance in terms of their intensity ( $\chi^2(1) = 0.290, p = .59$ , with a mean rank score of 55.19 for SU and 51.19 for MCR). Next, a multiple linear regression further confirmed that mentors’ country of reference (including controls) did not significantly predict the extent to which respondents experienced negative emotional states.

#### 5.4.4 Facilitators and Barriers

We now discuss some sub-themes (Table 5 - 3; Appendix A) selected according to how frequently these were discussed by interviewees or their potential to advance mentoring research and practice (in italics).

**Table 5 - 3 Incidence of selected sub-themes (qualitative evidence)**

Factor	Scotland		Italy	
	Barrier	Facilitator	Barrier	Facilitator
Supervision & staff support	25%	<b>92%</b>	25%	<b>63%</b>
Self-efficacy	<b>58%</b>	42%	<b>75%</b>	<b>50%</b>
Fellow mentors	8%	<b>67%</b>	0%	<b>75%</b>
<i>Normative commitment</i>	8%	42%	0%	13%
<i>Flexible approach/ Not knowing mentee's issues</i>	8%	25%	25%	38%



First, a particularly salient factor concerns the supervision and support provided by on-site coordinators and, for SU, professional psychologists. These were identified by most of the interviewees (92% in Scotland and 63% in Italy) as essential reference points when it comes to be encouraged or overcome insecurities. However, in both samples, 25% of participants reported some issues. For instance, both in Scotland and Italy, some novice mentors [Celine, Rupert] stressed the need to introduce periodic check-in points that, rather than being requested, are automatically in place, because:

*“[...] if I have to ask for something, probably I don't ask. If, on the other hand, we talk about the general issue, within this, maybe doubts, requests, more things come out [...] I'm talking about stuff that hasn't been rationalized yet and that can only be rationalized through a chat [...].” [Rupert]*

Hence, survey data will provide the grounds for checking whether:

- Hypothesis 4. first-year mentors display lower satisfaction with the ongoing support and communication offered (item 1), also with respect to developing strategies for fostering positive MRs (item 2), compared to more experienced ones.

Considering each organization separately, the Bonferroni adjusted p-values of pairwise comparisons do not yield convincing evidence that first-year mentors are less satisfied than more experienced ones with the support received. For the first item, a multinomial logistic regression further tested if (controlling for age and gender) being a first-year mentor predicted satisfaction with this aspect. Four clusters were considered, which included mentors who reported to be: “Scarcely satisfied”, “Somewhat satisfied”, “Satisfied” or “Very satisfied” (with the first cluster acting as reference group). Only within SU, being a novice mentor was a significant predictor ( $p = .048$ ) of a lower probability to be “Satisfied” (OR = 0.062 – 95% CI 0.004-0.973). The ordinal logistic regression that, instead, included the second item as the dependent variable displayed unsatisfactory model fit.

Second, while “sensitizing experiences” usually boosted mentors’ sense of self-efficacy, Scottish (58%) and particularly Italian (75%) mentors described a number of reasons why they doubted their abilities, such as fearing of: not being able to establish an affective relationship or manage a completely new experience, difficult situations, problem behaviors or sensitive information; lacking the adequate profile (e.g., former teachers) or level of experience to deal with youth; not appealing to the mentee; assuming responsibility over a child’s wellbeing or committing for a prolonged period. In this case, the hypothesis that survey data will help validate is whether:

- Hypothesis 5. Italian mentors scored lower in terms of self-efficacy, compared to Scottish ones.

Analyses show strongly significant differences in the baseline self-efficacy scores reported by Scottish and Italian mentors, with the former scoring higher ( $\chi^2(1) = 9.731, p = .002$ , with a mean rank score of 68.85 for MCR and 49.09 for SU). A multiple linear regression was used to predict mentors’ self-efficacy based on their reference country (and controls). Mentors’ country was, again, the sole significant predictor and respondents’ confidence in their mentoring abilities decreased of 0.506 when Italian.

As interview data indicate, another facilitator widely mentioned by Scottish interviewees (67%) and Italian ones (75%), is the support that fellow mentors provide, since, during peer interactions, individual learnings are capitalized on, good practices or coping strategies jointly elaborated, the process of expectation adjustment triggered and a sense of camaraderie promoted. In sum, as Anne explained:

*“This thing, for me, was more than fundamental. In the sense that, initially, I was also quite afraid [...], so having other mentors alongside you in a sort of [...] apprenticeship, in short, with the help of others, for me has been very very helpful and very rewarding!” [Anne]*

As interviewees often expressed the desire to engage more with fellow mentors, we will test whether:

- Hypothesis 6. respondents reported a lower satisfaction with the SNCB activities offered than with overall program support.

In line with the assumption, results of Wilcoxon signed-ranks tests indicate that, in both samples, satisfaction was significantly lower for SNCB activities (MCR:  $Z = 3.0$ ,  $p = .002$ ; SU:  $Z = 4.4$ ,  $p < .001$ ).

Albeit less prominent in interviewees' narratives, a concept to be given special attention as to mentors' intention to continue is feeling normatively committed to the MR. What is worth noting is that some mentors (42% in Scotland and 13% in Italy) explicitly referred to this sense of obligation, as Rupert explains: "*[...] the non-interruption is not so much due to the fact that the satisfaction was skyrocketing and I could never help but to interrupt it, but rather because it was simply a commitment.*". The fact that mentor endurance is put in connection to this concept may reveal mentors' strong altruistic orientation and/or an underlying dissatisfaction. Thus, survey data will be used to check whether:

- Hypothesis 7. dissatisfied mentors are less normatively committed when reporting low altruistic motivations to volunteer, compared to dissatisfied but more other-oriented respondents.

This hypothesis did not achieve statistical significance ( $\chi^2(1) = 1.451$ ,  $p = .228$ , with a mean rank score of 17.20 for dissatisfied and highly altruistic mentors and 13.8 for dissatisfied and scarcely altruistic mentors). Yet, normative commitment correlated significantly and negatively with overall satisfaction with the mentoring experience ( $r = -.441$ ,  $p < .001$ ).

Finally, although evidenced only qualitatively, another factor deserving consideration is the presence of absence of a flexible and tailored approach. A quarter of the Scottish interviewees appreciated the fact that MCR allowed some departures from usual practices. Conversely, a relevant share of SU mentors (38%) saw unfavorably the inflexibility of some rules, which, for instance, prohibited supervised community outings, the abovementioned informal group meetings among

mentors or direct contacts with mentees' families and teachers, since: "[...] *all these things here limit you. [...] To take home the best, you don't take anything home, because you can't! You bring home a sterile relationship!*" [Rupert]. The same applies to a further rule: not providing mentors with even vague information about what the mentee's issues are, which caused some struggles for some mentors [Edwin, Rupert, Cindy], who feared that this could make their efforts less effective, if not even inadvertently harmful.

Ultimately, what is worth stressing is that the aspects illustrated in this section highlight that the needs or difficulties mentors expressed, even if operating within different organizational and socio-cultural environments, were particularly alike.

### **5.5 Discussion and limitations**

The current cross-cultural study adds, in multiple ways, to the relatively underdeveloped body of research literature that explored mentors' experiences, especially if via mixed-method designs. Retracing our findings, it was found that the metaphors, symbols and definitions describing the mentoring role and/or experience were rich, varied and, overall, consonant with those documented in prior studies (Ganser, 1994). Most importantly, only some of the assumptions stemming out of extant cross-cultural theories (Goldner & Scharf, 2013; Molpeceres et al., 2012) were corroborated. For instance, as we would expect from more individualist cultures, exclusively Scottish mentors intended their role as directed to promote mentees' self-determination and sense of competence. However, in Italy – despite its more familistic and authoritarian culture – interviewees were extremely at ease with describing the MRs as friendly relationships between equals, involving the supply of emotional support. Also, the hypothesis that prescriptively providing direction and guidance is, in principle, more consonant with more hierarchical cultures was not strongly supported, since definitions from both Italian and Scottish mentors focused on this function. Obviously, it is hard to discern whether the adherence of many Italian mentors to the organizational motto "*An adult as a friend*" was genuine, and truly internalized, or rather resulting from a response bias (i.e., social desirability). If the first assumption is taken as true, such results would indicate that an organizational culture that strongly emphasizes the friendly and equal nature of MRs

– as within SU – can offset wider cultural influences (namely, a relatively lower aversion to power distance, moreover unfolding in a context wherein the within-pair age difference between mentor and mentee is generally far more marked than it is in the Scottish setting).

Furthermore, findings concerning the drivers, fallouts, enablers and hindrances of the mentoring experience are equally fraught with implications (Table 5 - 4). Evidence suggests that the motivational and outcome domains to leverage in order to recruit growing numbers of volunteers are context-specific. As prior research highlighted, in liberal regimes (UK), people are more likely to feel normatively driven to altruistically help others as part of their citizenship responsibility (Hustinx et al., 2010; Hwang et al., 2005). In line with this, Scottish mentors, as collective volunteers (Hustinx & Lammertyn, 2003), found prime motivations in the sense of duty toward others and the wider community. Hence, recruitment campaigns that emphasize other-oriented motivations to volunteer are likely to resonate with a broad audience. Nonetheless, the mismatch between the mean ranks of motives and positive outcomes also reveals that MCR's mentors, *ex-post*, valued more than Italians other aspects, such as the self-enhancement, ego-protection and career-related (significantly, in this latter case) gains accrued by being mentors of at-risk youth. Raising awareness on the ability of mentoring to satisfy these needs can help escalate the number of individuals eager to become mentors. In contrast, in Italy, individuals may be more predisposed to respond positively to communications envisaging self-interested outcomes as well. Yet, data seem also to indicate that Italians – albeit generally more driven than Scots by a number of instrumental motives –, felt they benefitted less than what desired on the corresponding outcome domains. For SU, the issue seems more about ensuring that actual mentors accrue benefits to an extent aligned with the importance attributed to them as motives to mentor. The study also shows that, physiologically, mentors incur some adverse consequences, still too little explored and documented (Bufali et al., 2021). It is, thus, crucial to properly inform prospective mentors about this contingency, helping them formulate realistic expectations, and to provide extra monitoring and support to prevent certain emotional states from resulting in disengagement.

Furthermore, as with prior studies (J. Lee et al., 2010; Monk et al., 2014; Tierney & Branch, 1992), we provide evidence supporting that strong collaborations with on-site liaisons prove to be instrumental in the success of programs and sustained mentor participation (Lee et al., 2010; Monk et al., 2014; Tierney & Branch, 1992). Although tests only partially supported that the assistance and supervision offered to novice mentors should be strengthened (i.e., within SU), both mentoring organizations can consider whether the inclusion of default and periodic catch-ups for beginners is desirable, as some interviewees suggested. Second, as already documented (Bufali et al., 2021), perceived self-efficacy appears to be among the elements that most significantly influence mentors' overall perception of the experience. Thus, program coordinators should engage in an ongoing monitoring of mentors' confidence in their abilities and provide particular support, guidance and encouragement when mentors feel ineffective. Although such recommendations apply to both programs, mentors from SU appeared significantly more challenged when it comes to doubting their abilities, as would be expected from participants from a country with a less individualist cultural orientation (Klassen, 2004). Third, prior studies underscored that co- or team mentoring, as well as group development sessions, can represent an important locus for socializing and strengthening group ties, while lessening mentors' intimidation or inconsistency to commit (Monk et al., 2014; Tierney & Branch, 1992). Consonant with these findings, we show that mutual support among mentors greatly enhance their experience and that both organizations are encouraged to provide wider opportunities for interaction among volunteers (i.e., SNCB activities). Fourth, extant research hinted at the fact that mentors – even if not satisfied – may persist to not fail or harm their mentees (Aresi et al., 2021; Caldarella et al., 2010; Gettings & Wilson, 2014). The current study found that such sentiments seem not related to how strongly other-oriented mentors are but, rather, to their dissatisfaction with the experience. Thus, particular attention should be paid to better explore this association and monitor what may be an early sign of discontentment. Finally, in both countries, some interviewees reported they struggled to tolerate some rules of conduct, such as being kept in the dark about mentees' issues. Administrators can carefully consider whether, when and how more flexible and tailored solutions can be beneficial (e.g., supervised community outings) or provide

stronger justification for certain rules to be in place. Overall, as concerns the facilitators and barriers considered, there is evidence of a certain alignment in the self-reports of mentors from diverse cultural and organizational settings. There seems to be ample scope to corroborate such preliminary findings, especially considered that the effects of some of these factors (i.e., normative commitment, strictness of rules) still appear generally little explored.

**Table 5 - 4 Joint display**

<b>Dimensions</b>		<b>Findings from qualitative data</b>	<b>Confirmed by quantitative data</b>
Motives	Understanding & Enhancement	More salient for Italians	Strongly
	Giving back	More salient for Scots	
Outcomes	Protective & Career	More salient for Scots	Partially (Career)
Negative emotions		Even proportions & intensity	Strongly
Factors	Satisfaction with ongoing support	Lower for first-year mentors	Partially (Italians)
	Self-efficacy	Lower for Italians	Strongly
	Satisfaction with SNCB activities	Lower than with program support	
	Normative commitment	Lower for dissatisfied mentors when less altruistic	No



Before concluding, it is worth pointing out that, as common with the research design employed (Creswell et al., 2003), some challenges stemmed from collecting concurrently qualitative and quantitative data, as this not always ensured the availability of suitable survey data to test emerging hypotheses. Despite the use of retrospective event history techniques (Spector, 2019), the small scale of the evaluation and its cross-sectional nature prevent from generalizing findings and drawing causal inferences, which would require replication of fieldwork in multiple settings, time points and wider samples. This latter requirement is also necessary for strengthening the conclusions of the cross-cultural comparisons made. Although the fact that, in many cases, results were consonant with prior research bodes well, the sample width achieved did not allow for formally checking whether the factor structures of the inventories administered were the same across the two cultural groups. Prospective studies that overcome this limitation would allow to rule out that any detected between-group differences result from construct or structural inequivalence (van de Vijver, 2015).

## **5.6 Conclusions**

Given the paucity of cross-cultural and mixed-method research examining the fallouts of mentors' participation in SBM, the current study strongly advances mentoring practice and research. One of its major strengths is that, while interview excerpts aided the identification of important dimensions of the research problem, their integration with quantitative evaluation data helped refine the insights embodied in the seven hypotheses. Another main contribution lies in having expressly framed the analysis in comparative terms, uncovering some variations in how mentoring is experienced within countries featuring diverse welfare regimes and cultures (von Schnurbein et al., 2018). Indeed, several volunteer management practices were found to be generally desirable (e.g., increasing mentors' awareness about potential negative consequences, their sense of self-efficacy or interactions among mentors). Conversely, the suitability of others appeared context-dependent. For instance, while MCR can strengthen mentor recruitment by raising public awareness about some specific gains accruable by being mentors, SU can rather enhance retention by ensuring that mentors actually realize anticipated gains. Accordingly, recruitment and retention practices found to be effective in a given

context should no longer be regarded as unquestioningly transferable in different settings. Given this and the worldwide growth of SBM, this paper intends to give impetus to more fundamental comparative research on the topic, critical to advance our understanding of which practices, in differing contexts, most contribute to the effectiveness of volunteer management and MRs.

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## **Chapter 6: Scaling social innovation: a qualitative cross-cultural comparative study of school-based mentoring interventions**

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## 6.1 Introduction

Social innovation, understood as a novel way of working that fosters collaborations between civil society, private and public actors, is increasingly promoted, in public policy debates (Krlev et al., 2020), as a vehicle to developing innovative and efficient solutions to address societal needs (Sinclair and Baglioni, 2014). Hence, its scaling, intended as “*the process of expanding or adapting an organization’s output to better match the magnitude of the social need or problem being tackled*” (Desa & Koch, 2014, p. 148), has recently become a focus for many (Brandsen et al., 2016; Steiner et al., In Press). Given the novelty of the social innovation concept, the body of literature currently available about its scalability is still sparse (Bolzan et al., 2019) and the mechanisms behind scalability scarcely researched and understood (Brandsen et al., 2016; van Lunenburg et al., 2020). This paucity becomes even more relevant in the face of crises such as the Covid-19 pandemic, when novel approaches to governance are likely to require further scrutiny to explore if and how they are to be effective in responding to high-impact threats (Montgomery & Mazzei, 2021).

A rising societal issue of particular concern to several European countries, especially after Covid-19, is combating educational poverty and inequalities of access to learning opportunities among youth (Kraft & Falken, 2021). Eurostat statistics show that, in recent years, some European countries had particularly high rates of premature school dropouts and of young people neither in employment, education or training (NEETs). School-based mentoring (SBM) is increasingly widespread as an intervention to mitigate youth educational disengagement and its long-lasting scarring effects. It rests on the establishment of supportive relationships between students and caring non-familial role models who help mentees navigate more successfully their educational and social-emotional development (Spencer, 2012). As a growing body of empirical research shows, mentored youth can accrue modest but statistically significant gains, both academically and in terms of psycho-social wellbeing (Herrera et al., 2007, 2011; Karcher, 2008; LoSciuto et al., 1996; Wood & Mayo-Wilson, 2012).

In response to the need for extending research on social innovation scalability, the current comparative study examines how two SBM programs, respectively promoted



in Scotland and Italy, identified and responded to context-specific obstacles and facilitators to scale. In doing so, the study seeks to understand: which are the contextual enabling conditions that need to be in place to devise effective strategies to scale social innovation initiatives? And in which ways initiatives can respond to and act upon those contextual conditions to drive scaling? Facing which risks?

The article is organized as follows. First, we introduce the concept of social innovation and briefly review research concerning its scalability. Then, we describe the two programs considered and the methods employed. Next, we illustrate our findings drawing on a stimulus-context-response framework (Morton et al., 2011). Hence, we present the catalysts of scaling, the policy and cultural contexts faced and their influence on scalability, as well as the organizational responses. We then illustrate evidence as to the risks that scaling organizations may incur. Finally, we discuss key study implications for research, policy and practice.

## **6.2 Background**

The concept of social innovation – despite being a buzzword in current debates – is still poorly defined, understood and researched (Brandsen et al., 2016; Sinclair & Baglioni, 2014). As such, to date, a broad range of interpretations exist, within a seemingly constantly evolving discussion (Ayob et al., 2016). Several definitions (e.g., Mulgan, 2006; Phills et al., 2008; Westley & Antadze, 2010) put emphasis on the path-breaking and transformative trait of social innovations. Nonetheless, even well-known, pre-existing solutions can be socially innovative, as long as they serve new population segments or entail a shift in paradigm as to how their provision and delivery are organized (Sinclair & Baglioni, 2014). Others conceptualized social innovation by looking at the processes it triggers and, in particular, to how system agents' responses lead to transformed social relationships. Hence, social innovations would strengthen system capability, social assets and resource utilization by promoting the rise of inclusive and collaborative delivery and/or governance networks (Brandsen et al., 2016; Gerometta et al., 2005).

This last conceptual line is precisely the one adopted in this paper, as it fully captures the socially innovative nature of SBM. Indeed, SBM entails a radical departure from dominant paradigms: youth educational and wider developmental needs are no

longer exclusive prerogative of schools and families. A third party (namely, a mentor) enters the equation, bridging between two sides of the support system (Jones et al., 2009). Furthermore, the effective provision of SBM initiatives cannot take place without engaging multiple actors in a collaborative effort. To a minimum, coordinating nonprofit organizations (NPOs) have to partner with hosting schools and persuade communities to contribute volunteer workforce (Jocovy & Garringer, 2007). At best, broad-based and internally more varied networks are established to allow the initiative to acquire the visibility and resources critical to its success (e.g., Fassetta et al., 2014)

Despite the paramount importance of social innovation scalability for policy and practice, only a narrow body of theoretical and empirical research has explored this topic. Particular focus has been placed on scaling “pathway choices” or stages. Some scholars described the varied strategies, tactics and institutional infrastructures that can be used to scale (Dees et al., 2004; Larson et al., 2017; Mulgan et al., 2007; Waitzer & Roshan, 2010; Westley et al., 2014). Others, instead, adopting a stage-based view, saw choosing a route to scale as just one of the decision-making processes that take place over a multi-stage pathway (Elkington et al., 2010; Gabriel, 2014; Murray et al., 2010). Although this strand of literature pays attention to some organizational-level aspects, the role of influential contextual conditions and factors is neglected. Accordingly, others stressed that both internal and external factors can be conducive to the expansion of social innovations (Bloom & Chatterji, 2009; Morais-Da-Silva et al., 2016; Perrini et al., 2010).

Unsurprisingly, the existence of persistent social issues and awareness of the need to address them are believed to ease the scaling process, generating a strong demand for value-creating innovations (Mulgan et al., 2007; Perrini et al., 2010; WHO & ExpandNet, 2009). Existing research has also widely acknowledged the importance of a supportive policy environment and of government support for an innovation to scale. A strong political will to address the social need, as well as policy settings that incentivize individuals or institutions to jointly pursue public and private interests and favor experimentation can crucially foster scalability (Han & Shah, 2020; van Lunenburg et al., 2020). Also, while open, participatory bureaucratic systems

facilitate scalability (WHO & ExpandNet, 2009), excessively strict rules, alongside a cumbersome bureaucracy, can frustrate scaling efforts (van Lunenburg et al., 2020).

With respect to the ways in which initiatives can act upon contextual characteristics, a first prominent theme pertains to leadership, vision, values and culture. Several contributions have seen the leadership, entrepreneurial, resource-mobilization and political abilities/skills of the actor who initiates the process as highly influential over scalability (Bolzan et al., 2019; Han & Shah, 2020; Morais-Da-Silva et al., 2016; Perrini et al., 2010). Often, as a reflection of the initiator's scale ambition, different scaling pathways ensue (e.g., Westley et al., 2014). Leaders may also define the vision and institutional logic guiding the scaling process, as they can intend their mission as directed to scaling an innovation out and/or deep (Bloom & Chatterji, 2009; Desa & Koch, 2014; Moore et al., 2015; Zhao & Han, 2020). In the first case, the best way to create social value is "social spillover" (Zhao & Han, 2020): serving as many locations, people and communities as possible. In the second one, the aim is a smaller-scale but profound change of "*people's hearts and minds, their values and cultural practices, and the quality of relationships they have*" (Moore et al., 2015, p. 74). Finally, scholars have stressed the importance of other organizational features, such as brand reputation, credibility, a participatory and inclusive organizational culture, the capacity to co-create with the community (Bloom & Chatterji, 2009; Morais-Da-Silva et al., 2016; Voltan & de Fuentes, 2016).

Another noteworthy family of themes relates to the mechanisms adopted to acquire allies and, consequently, resources. There seems to be broad consensus on the importance of building coalitions with a plethora of stakeholders (e.g., wider local communities, participants, investors, NPOs, large corporations and the government) to enhance scaling processes (Bloom & Chatterji, 2009; Bolzan et al., 2019; Han & Shah, 2020; Morais-Da-Silva et al., 2016; Perrini et al., 2010; Voltan & de Fuentes, 2016; Westley & Antadze, 2010). Prior research has also pointed to a key role allies can play in going forward on a large scale: resource provision (Han & Shah, 2020; Voltan & de Fuentes, 2016). Among the variety of players, governments deserve greater attention, because – as some stressed – making of them an ally, rather than an enemy or hindrance can strongly boost scalability (Morais-Da-Silva et al., 2016; Pandey et al., 2017).

Finally, a narrow stream of research investigated the risks faced while trying to reach a larger scale. First, an “operational risk” can undermine the ability to deliver the desired social impact (Zhao & Han, 2020). This pitfall can trace back to an “internal misperception”, wherein implementers misunderstand the model to be scaled and deviates from its constituent elements, in turn, implementing it inconsistently. When innovations scale fast and wide, this tension may arise from time-management issues and trade-offs (Braga et al., 2014; Smith et al., 2013): the short-term goal of broadening rapidly implementation and operational capabilities conflicts with longer-term objectives of securing an adequately skilled staff. Tensions of this kind may also surface in relation to the management of wide-ranging partnerships (Smith et al., 2013; Voltan & de Fuentes, 2016; Westley et al., 2014), resulting in a possible lack of integration, ownership and implementation fidelity. Second, scaling can face risks related to the mobilization of adequate resources (Braga et al., 2014; Welty Peachey et al., 2020) referred to it by Zhao & Han (2020) as a “*shortage of funds for organizational survival and growth*” (p. 145). Finally, scaling can fail due to a lack of credibility (Braga et al., 2014; Welty Peachey et al., 2020) or a “legitimacy risk” (Zhao & Han, 2020), which occurs if stakeholders deny support to widen adoption because the innovation is perceived as incoherent with existing socio-cultural norms.

Overall, prior research is often limited in that little attention has been paid to exploring how systemic-level contextual conditions affect scaling efforts and their successfulness. Furthermore, the role of some factors, such as the socio-cultural context or monitoring and evaluation (M&E), appears to date largely understudied. Additionally, the area of inquiry concerned with scaling risks (e.g., Westley et al., 2014; Zhao & Han, 2020) seems not only particularly underdeveloped but also overly focused on the downsides inherent to chosen scaling strategies, overlooking the pitfalls that the broader context can in turn conceal.

### **6.3 Methods**

This study seeks to explore the contexts, mechanisms and risks of the scaling pathways undertaken by two SBM interventions, promoted by the Scottish NPO MCR Pathways (MCR) and the Italian NPO Società Umanitaria (SU). Both are considered an example of social innovation initiatives, because they involve

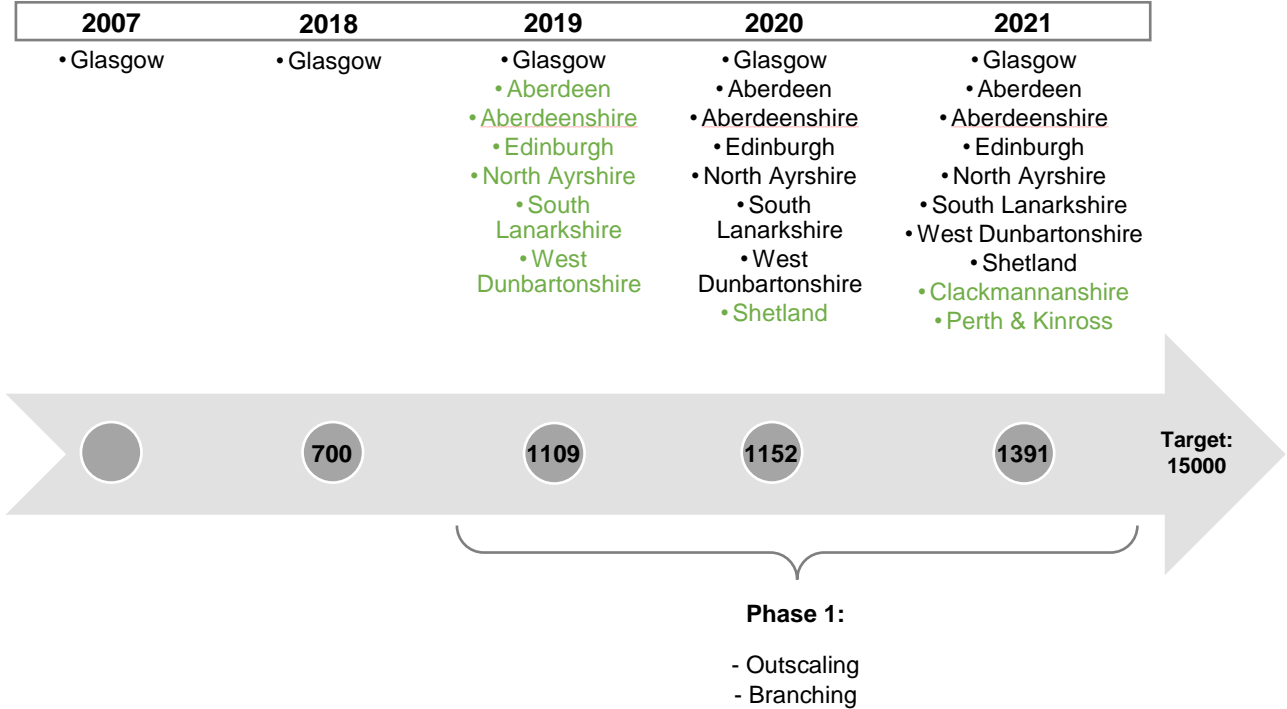
*“networks and joint action in social realms beyond business and government routines”* and *“raise hope and expectations of progress towards something ‘better’”* (Brandsen et al., 2016, p. 6). The MCR program, set up in Glasgow in 2007, supports secondary school students whose ability to engage in education is impaired by the disadvantage and home instability they experienced, including pupils in the care of local authorities (referred to as care-experienced or looked after children). Its provision involves local councils, schools, for-profit organizations and NPOs. SU, established in Milan in 1893, offers a wide range of socio-cultural activities to promote social dignity through education. The SBM scheme entered this wider portfolio in 2003, targeting pupils in elementary and middle schools of various regions, and is provided mainly with the involvement of NPOs, schools and civil society.

In terms of context, the two countries were chosen as presenting vastly dissimilar features. They in fact, represent different typologies of welfare regimes (Esping-Andersen, 1990; Ferrera, 1996; Salamon et al., 2000). Scotland embodies a liberal regime, closer to North America, where SBM originated, while Italy represents a “Mediterranean” welfare state with a strong family ethos (Reher, 1998), wherein the mentor role risks being more easily perceived as illegitimate and in rivalry with kinship (Molpeceres et al., 2012). Furthermore, the routes through which the SBM schemes have been taken to a larger scale are almost antithetical. As Figure 6 - 1 shows, MCR started scaling out the program fairly recently and, since then, expanded fast and wide. Also, MCR replicated using branching, with *“the creation of local sites through one large organization”* (Dees et al., 2004, p. 28). Additionally, MCR has recently shifted to a vertical scaling<sup>23</sup> (WHO & ExpandNet, 2009), since formal decisions have been made, in early 2021, by the Scottish Government to institutionalize and sustain a nation-wide rollout of the intervention (Scottish Government, 2021).

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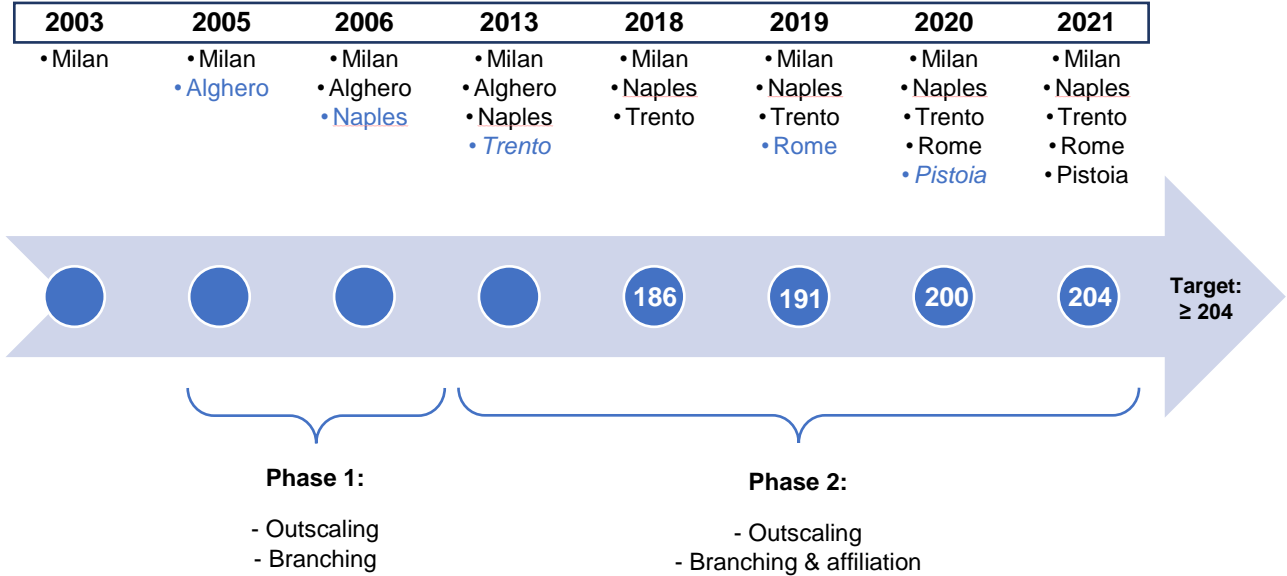
<sup>23</sup> It *“takes place when formal government decisions are made to adopt the innovation on a national or subnational level and it is institutionalized through national planning mechanisms, policy changes or legal action. Systems and structures are adapted and resources redistributed to build the institutional mechanisms that can ensure sustainability”* (WHO & ExpandNet, 2009, p. 30).

**Figure 6 - 1 MCR Path to scale**



As to SU (Figure 6 - 2), the scale out beyond Milan started soon after the onset of the scheme and, until 2013, only branching was used, introducing the program in its pre-existing headquarters. Afterwards, SU also resorted to affiliation (a “*formal relationship defined by an ongoing agreement between two or more parties to be part of an identifiable network*” – Dees et al., 2004, p. 28) to formally outsource the implementation of the program to external NPOs. Over years, the scope and speed of the expansion have been limited, with no use of vertical scaling.

**Figure 6 - 2 SU path to scale**





### 6.3.1 Data collection and analysis

An expert, purposive, heterogeneous sampling was adopted (Etikan et al., 2016). Overall, 9 in depth semi-structured interviews were undertaken, involving five managers from different hierarchical levels and functional areas for MCR (top-level n=3, middle-level n=2) and four managers operating in the local teams of different geographic areas for SU (middle-level n=4). The interview guide (Appendix A) was designed consistently with the WHO report for the development of scaling up case studies (Fajans et al., 2007) and sought to elicit the participants' views about:

- How the expansion was conceived and operationalized;
- Which organizational or contextual factors affected the most scaling path and outcomes;
- Which actions and strategies were undertaken to act upon the contextual factors;
- The steps/challenges/risks (faced or envisaged) of sustaining the scaling-up.

Ethical approval was obtained from the University of Strathclyde Department of Management Science Ethics Committee. Interviews were carried out in participants' native language, audio-recorded, transcribed verbatim, and subsequently analyzed using the qualitative data analysis software NVivo 12. The preliminary coding book was produced by reconciling the frameworks made available by Koorts et al. (2021) and Zamboni et al. (2019), which both extensively build on the WHO & ExpandNet (2009) framework for scaling up. The latter was chosen by virtue of its exhaustiveness, which promised greater analytical depth and coverage of conceptual dimensions beyond those identified in our review. Original sub-themes were traced back to two overarching themes:

- Contextual characteristics (assets and/or deficits);
- Organizational characteristics of the parent organization and mechanisms activated to scale.

Initially, the first author thematically analyzed interview data. In a second round, the co-author validated the coding in a blind process. When illustrating findings, verbatim quotes are included to substantiate authors' interpretation. The chunks of text extracted from Italian interviews were translated by the authors, both Italian

native speakers, allowing for cross-cultural meanings and interpretations (Temple & Young, 2004).

## **6.4 Findings**

As anticipated, results will be illustrated according to a stimulus-context-response framework, presenting evidence for MCR first and, subsequently, for SU. The illustration of the organizational responses is further structured in three sections: leadership, vision, values and culture; M&E; allies and resource acquisition. Finally, scaling risks are illustrated.

### **6.4.1 Stimulus**

The MCR scale-up journey literally originated from failure. Indeed, what triggered its founder was the absolute frustration with the status quo. The experience he had, in the early 2000s, in leading the turnaround of three failing care organizations in England led him to realize that the extant support system for care-experienced young people was nothing but a bust: expensive and, nonetheless, fundamentally unable to prevent young people from getting poorer outcomes than peers:

*“[...] MCR Pathways came [...] from failure, because sorting out those organizations took five years [...] and it made no difference to the young people.”* [Participant 1]

The sudden realization of the system failure, alongside the awareness of the attainment gap it fueled, was at the heart of the decision of the founder to find a way to change the system: *“MCR Pathways was created from frustration and system failure and ... just from ‘It has to be a better way’”* [Participant 1]. This trigger ignited a demand-driven expansion, which prioritized high-needs schools and local areas where the scheme could make the most impact: *“[...] you've got to go where you think the program's most needed”* [Participant 4].

Somewhat similarly, the wake-up call for SU to act came from a *“real need”*, even more apparent in Southern Italy, where recorded rates of school drop-out and NEETs are *“beyond any logic!”* [Participant 8]. The concerns for the long-term repercussions of educational poverty further intertwined with those deriving from population ageing, as Participant 9 suggested: *“In short, the problem of young people is*

*dramatic [...] who is going to pay our pension?"* [Participant 9]. Given the extent of the need, it was not surprising that: *"any intervention that could help teachers to take care of the most unfortunate children [...] was well-accepted"* [Participant 8]. SU faced an educational system starving for any additional aid that private providers could offer, especially if at zero costs, well planned and executed.

#### **6.4.2 Contexts**

Study participants from MCR described a number of enabling factors, rooted in the Scottish policy context, which enhanced scalability and provided opportunities to build up a model that might address the needs of young people. The Children and Young People (Scotland) Act 2014 (Scottish Parliament, 2014) was identified as a crucial milestone, which fortified the support system available to care-experienced young people by investing a variety of publicly-funded organizations with so-called "corporate parenting" duties. In other words, as reported by Participant 2, this Act has set: *"a legal obligation [...] to provide [youth] with an education and to provide them with all the support to give them the best possible start and ongoing chances in life"*. Additionally, "The Promise", a recent Independent Care Review (2020) report, embodied a strong political will to ensure that the required actions to meet the developmental and educational needs of *all* children are undertaken. Last but not least, as Participant 3 acknowledged, the Scottish Government further drove change using procurement to incentivize corporate social responsibility efforts from businesses. At the same time, the policy context also hindered the development process, at least in the early stages, due to the lack of adequate and stable investments in new services acknowledged by Participant 1: *"Fundamentally there isn't enough money in the system [...]. So that is pressure, pressure on save the money"*.

In addition, a climate of skepticism characterized the introduction of the social innovation initiative, with individuals being quite wary of its results, as Participant 5 described:

*"I think there was a sort of nervousness about allowing people who aren't trained to teach, you know, to go into*

*schools. [...] How can this possibly make a difference?"*

[Participant 5]

This general attitude was combined with a fundamental unwillingness of policy-makers to accept system change merely on the basis of anecdotal stories: "*[...] I tried and failed to persuade the local authority for the 35 years prior by sharing stories.*" [Participant 1]. As Participant 1 suggested, although inspirational stories could make some people passionate about making a difference, to counteract the skepticism and ignite a wider system change: "*you need to show the statistical impact and the savings [...]*".

SU faced a number of hindrances as well, such as those concerning the surrounding financial and legal policy framework. In this respect, participants mentioned the Law No. 285/1997 (Italian Parliament, 1997), a policy thanks to which SU managed, in the past, to access funds. Nevertheless, this led to recognize the downsides of taking advantage of public funding opportunities, which proved fairly unattractive due to the resulting monitoring and reporting burdens to be borne: "*[...] the financing was linked to a continuous monitoring of the activity, a control over the various steps of the project [...]*" [Participant 6]. Further difficulties were ascribed to the disproportionate focus of current private calls for funding on ground-breaking interventions. This trend was seen as fundamentally incongruent with the capacity-building and staffing necessities of those "*who have been carrying out a project for many years, with professionalism*" and who would like to pursue "*a structuring of what works*" [Participant 8]. Finally, obstacles to operate and grow were perceived as arising from a lack of responsiveness from public administrators and proliferating legislations (e.g., privacy and child protection) and bureaucracies, which made managing the program in a law-compliant manner more demanding.

In addition, interviewees described a wide number of barriers related to dominant cultural paradigms. A widespread misunderstanding of what the mentor role truly entails was found. The mentor was often erroneously seen as a person that: "*can replace a parent*", or there was the assumption "*that mentoring can be an activity that makes up for educational shortcomings*" [Participant 6]. Moreover, a misconception that mentoring outcomes should be primarily academic and rapidly

attainable was also identified, whereas enhancing mentees' overall well-being: *"takes a long time and often does not coincide with the immediate improvement of school production"* [Participant 6]. Also, mentoring – which pulls a student out from face-to-face lessons and the class group – was often perceived as conflicting with youth's primary educational responsibilities. This created implementation challenges and, at times, aprioristic rejections by parents, such as those Participant 6 described: *"Why should my child leave the classroom to do an activity when, at that moment, an educational activity is taking place?!"*.

### **6.4.3 Responses**

#### **6.4.3.1 MCR: Leadership, vision, values and culture**

What is fairly unique about MCR is that the founder set – from the very beginning – an ambitious vision, which consisted of permanently and pervasively changing the extant system, achieving a system-level embeddedness of the intervention:

*"[...] I think one of the most powerful statements that we've ever had was that our ultimate plan is to be forgotten and that's what that meant: we want to get to the position that [...] what we offer to these young people just becomes the normal."* [Participant 3]

Equally relevant, once achieved program maturity, its ownership would be transferred to each local authority. Changing the system from the inside out and promoting strong public ownership over the initiative was key to securing its long-term sustainability. Another imperative drove the expansion, as Participant 1 revealed: *"[...] any young person that has the misfortune to end up being looked after by social work, either formally or informally, is going to get this support"*. Interviewees emphasized how having an emotional connection to such an inspiring vision helped to get all employees on board, create a groundswell of support and *"a common understanding of what we're going to do"* [Participant 2], make staff relentlessly positive and more innovative to achieve the growth objectives. MCR also benefitted from its strong learning culture, which led to introduce the program in those areas that offered the biggest challenges, but also opportunity for learning and

chances to persuade external audiences of the merits of the program, setting a compelling example:

*“[...] you don't do the easy thing. [...] you've got to go to the biggest challenge. Then you might die in the process, but [...] you motivate others to get involved.”* [Participant 1]

#### **6.4.3.2 MCR: M&E**

The challenges stemming out from operating within a resource-constrained environment made clear that, even if you're trying to change the system you: *“[...] can't add cost to it.* [Participant 1]. Hence, the model was built upon addressing this contextual characteristic. The reliance on volunteers contributed to enhance cost-effectiveness and overcome resource constraints, since: *“you've got big impact for much less cost than you would if you had to employ all the volunteers”* [Participant 1]. Next, it became crucial to make the community perceive this relative advantage: *“[...] it was very much determined, at the very early stage, that the way to be able to expand significantly was to be able to demonstrate that this works and that it's very, very cost-effective.”* [Participant 3]. Although the program developed and grew primarily to improve the educational outcomes, career prospects and life chances of disadvantaged youth, long-term sustainability was seen as dependent on the ability to show its benefits for *all* the parties involved (i.e., youth, schools, mentors and their employers, local community), which turned out to be game-changing:

*“I went back to the local authority, back to the council and, at that point, they couldn't really argue with me [...]. They couldn't argue with the stats.”* [Participant 1]

Timely engaging in M&E escalated the organization's bargaining power toward public sector partners, who could provide access to new schools and stable flows of financial resources. However, it also helped convincing employers (e.g., councils, “Corporate Parents”, private firms) to allow their employees to mentor during working hours, given the tangible returns achievable in terms of greater staff skills, wellbeing and motivation.

#### **6.4.3.3 MCR: Allies and resource acquisition**

When it comes to building cross-sector coalitions, the managerial team very quickly devised strategies to seize the opportunities provided by the policy context. This was operationalized primarily in two ways. First, mentoring was presented to external organizations as a way to meet their policy obligations, as: *“an opportunity to contribute to their corporate parenting responsibilities, or their corporate social responsibilities”* [Participant 3]. Second, to address the scarcity of resources, the organization opted for a split funding model, where local authorities would only pay for the people employed to run the program in that specific site, while MRC would raise external funds to cover overheads. The final step to ensure the sustainability of a nation-wide scale-up consisted of making the government provide all the Scottish local authorities with the funding needed to cover variable costs.

#### **6.4.3.4 SU: Leadership, vision, values and culture**

Growth was pursued, by SU, according to a vision that was about equipping, at first, its existing branches with this program. Instead, in those contexts where branching could not be used, as lacking locally established structures, SU scaled through affiliation. In essence, as opposed to MCR, these additional sites *“have not been chosen, usually there have been requests”* [Participant 7]. SU not only undertook a different and supply-driven path to scale but articulated the narrative about the scale-up objectives and results in terms of quality, believing that a growing community participation would naturally descend from it: *“[...] if there are only three of us but we work well, that's okay. [...] It is not necessary to have many schools! They need to work well for them to talk about it.”* [Participant 7]. Moreover, a key course of action to establish its credibility consisted of transferring the organizational culture, values and procedural norms into codes of practices, guidelines or operative tools. As some participants explained, the strengths of the initiative laid in high levels of program structuring and ‘proceduralization’:

*“[...] we have an organization behind us – even from a somewhat bureaucratic point of view – which greatly helps the induction of the program in a school. That is, whatever*

*question is asked, by a teacher or a school referent, it has its paper-based instrument [...].” [Participant 8]*

#### **6.4.3.5 SU: M&E**

Compared to MCR, the potential of leveraging evidence proving the cost-effectiveness of the scheme seemed relatively untapped. Indeed, so far, the reputation of the parent organization or its representatives turned out to be sufficient to stimulate the involvement of other community actors:

*“[...] I do realize that it [scientific evidence] is an excellent ‘letter of introduction’ [...]. In my case, I didn't have to use these cards, [as] the credibility of the organization that carries it out opens the way; the knowledge of me – as a referent – [...] has also facilitated this [...].” [Participant 8]*

Another manager reported that it was used mainly to reassure and persuade the final decision-makers (namely, school principals), yet serving a significant internal function: *“[...] we had in return the fact that we are happy to carry it out because [...] it has been scientifically proven that it is effective.” [Participant 7]*

#### **6.4.3.6 SU: Allies and resource acquisition**

Key advocates (i.e., driven teachers or principals) allowed SU managers to enter the school system *“from the front door”*, as trustworthy spokespeople. Furthermore, the strong reliance on managers previously employed within the school system greatly eased the interchange, assuring compatibility of mindsets, languages and goals:

*“[...] So, this head teacher, when he saw me, due to the fact that I was a colleague, he already had a more open listening than with someone that goes there by chance. And so, he accepted. [...] when this program gave its results [...] he called me and said: ‘Thank goodness your friend sent you, because I wouldn't even listened to you!’.” [Participant 7]*



In contrast with MCR, SU sought partners for scaling mostly within the nonprofit sector. In every local area, SU capitalized on its own or its affiliates' reputation to recruit mentors among their members and, in turn, their members' contact network:

*"We were then supported for years by the Rotary group, which gave us its members, advertised within the members, but [...] In short, we had, before Covid, about 1000 or more people who gravitated around the headquarters, who then, in turn, had friends [...]"*. [Participant 8]

Even affiliates replicated such a strategy, primarily seeking support from other NPOs to recruit mentors. Given the perceived poor accessibility of public funding mechanisms, SU's management preferred to resort to a broad-based pool of individual donors and membership fees. Public sector organizations' promotional endorsement was also used, albeit seen with a certain diffidence. Indeed, some managers feared to be perceived as politically connected or to receive more demand than they could meet:

*"I must admit that it also scares me a lot, because we are not a factory of volunteers. [...] Such a thing can be destabilizing for a program that is based precisely on the availability of human resources. [...] so, I haven't advocated this so much anymore [...]"* [Participant 8]

In terms of cultural barriers, parental reluctancies were partly counteracted by leveraging on the site-based nature of SBM and the trust relationship bonding schools and families:

*"[...] if the school provides help, it is the school that has to be trusted: [...] as a parent, I know that the school [...] proposes for my child an intervention that is considered valid, I trust the educational institution and I sign up."*  
[Participant 8]

To make mentoring seen less as an inappropriate use of pupils' school hours, SU underscored its synergies with the broader educational curriculum and learning

outcomes, further promoting the idea that such individualized activity could address young people's educational needs through a bespoke approach:

*"[...] demonstrating that the activity being carried out is, in any case, an educational activity – and not just a recreational one – is a deal-breaker in the bargaining with teachers ..."* [Participant 6]

#### **6.4.4 Scaling risks**

MCR representatives mainly described operational risks of internal misperception and mis-implementation. More specifically, key informants delineated a number of perils (potential or actual) stemming out from not having adopted a sufficiently phased approach. Indeed, growing too wide too fast could make the organization give in to the temptation of stretching the infrastructure too much or of matching non-suitable volunteers just for the sake of achieving numerical targets. Although scalability benefitted tremendously from purposely blending the expertise of new recruits drawn from the private, public and NPO sectors, a major drift derived from the difficulties in ensuring that all those taken onboard were aligned with the organizational values or fit for purpose: *"[...] we didn't get the recruitment right. We got some wrongs. And again, that's not fault of the persons we recruited, [...] most times they had the values, but just not necessarily the skills and experience. [...] We definitely haven't trained them right."* [Participant 1]

Participants from SU, instead, saw understaffing as the primary reason why further growth seems, at the current state, problematic, if not even unfeasible:

*"It is clear that [...] expanding would require – and will require – greater attention to monitoring the various steps and results and, therefore, the organization chart [...] will have to be, let's say, revised [...]."* [Participant 6]

This issue seems to relate to the resource acquisition and partnership strategies adopted, which, in the face of a policy setting wherein public financing opportunities are scarcely accessible, resulted in a financial self-sufficiency risk. Indeed, investing in staffing and internal capacity-building would allow managing growing numbers of

mentors but would unavoidably necessitate accessing additional funds. This, in turn, would require itself more staff (e.g., to apply and comply with monitoring and reporting duties). Also, given the widespread cultural resistances and difficulty to convey what SBM is truly about, the context faced by SU seems to entail risks of lack of legitimacy and organizational misperception.

## **6.5 Discussion**

This conclusive cross-case synthesis recapitulates the points of contact and/or differentiation between cases, while outlining some lessons learned and the contribution to the literature.

The cross-cultural comparative study offered valuable insights into the effects that wider policy or cultural frameworks exert on social innovation initiatives' attempts to scale. The evidence presented suggests that, while both initiatives developed to respond to pressing social needs, fueled by system failures, MCR and SU dealt with two highly differing ecosystems of scaling, presenting distinctive opportunities or obstacles to grow (Table 6 - 1). The Italian legal and financial framework was depicted as generally adverse and not conducive for an effective and rapid scaling. The scarce accessibility of policy instruments, alongside proliferation and unresponsiveness of bureaucracies, impaired scalability. In Scotland, where scarcity of resources initially represented an obstacle, the policy framework strongly favored the rollout of the program. In terms of cultural framework, SU appears grappled with counteracting a wider and more varied combination of barriers that have been in a way addressed, by MCR, through the use of research evidence.

**Table 6 - 1 Stimulus and contexts**

		<b>MCR</b>	<b>SU</b>
<b>Stimulus</b>		Extant support system for looked after children costly and ineffective	Whole educational system under-resourced
		Persisting attainment gap	Dramatic rates of school drop-out and NEETs
<b>Context</b>	<b>Policy framework</b>	Policy instruments effective in promoting concerted responses	Unresponsive and burdensome bureaucracies
		Lack of adequate and stable investments	Prohibitive monitoring and reporting duties to access public funding, mostly destined to initiatives perceived as new
	<b>Cultural framework</b>	Skepticism about SBM potential results	Misunderstanding of mentoring role/goals, perceived as conflicting
		Request of hard evidence	with pupils' educational duties

Our analyses also highlighted that each initiative pursued distinctive – if not, actually, antithetical – courses of action to sustain growth (Table 6 - 2). The vision, values and organizational culture emanating from the MCR leader implied scaling wide and fast, according to a “social spillover” institutional logic, which “*emphasizes the breadth of outreach (efficient and fast expansion to cover as many people as possible) as an appropriate way of creating social impact*” (Zhao & Han, 2020, p. 137). In contrast, the greater cultural resistance met by SU, as well as its vision, values and culture, led rather to have the program depth-scaled, through the promotion of a smaller-scale and gradual shift in rooted mindsets, behavior patterns and mainstream perceptions (Moore et al., 2015). Also, MCR’s approach turned out to be successful in being learning oriented, as it provided scope for understanding

what works or not in disparate geographic locations. Conversely, SU's one benefitted from procedural structuring, which made adopting schools perceive the model as credible and not burdensome to implement. Additionally, while SU leveraged on reputation to forge alliances strictly *within the nonprofit sector*, MCR opted to mobilize partners spanning *across sectors*. This was only possible through the provision of sound evidence that helped persuade policy-makers that the program was worth investing in to achieve policy goals. This, eventually, led to formal government decisions to redistribute resources to promote the adoption of the innovation at the national level (namely, vertical scaling – WHO & ExpandNet, 2009).

**Table 6 - 2 Responses**

	<b>MCR</b>	<b>SU</b>
<b>Leadership, vision, values and culture</b>	System change	Cultural change
	Scaling wide and fast	Scaling deep and gradually
	Learning culture	Procedural structuring
<b>M&amp;E</b>	High reliance on hard evidence	High reliance on reputation
<b>Allies and resource acquisition</b>	For-profit, Public, Corporate Parents	Nonprofit
	Private/public financing	Charitable giving, membership fees
	Corporate volunteering	Individual volunteering

Finally, the analysis revealed that the fast and explosive growth strategy pursued by MCR primarily concealed operational risks. It also suggests that, for SU, a mixture of strategic decisions and contextual factors created a shortage of resources to fuel further growth (financial self-sufficiency risk). Additionally, a cultural context somewhat resistant to change generated a legitimacy risk, with further expansion challenged by the perception that the model is: i) incompatible with prevalent paradigms; ii) expected to yield results limited to rapid improvements in educational attainment.

### **6.5.1 Contributions to research, practice and policy development**

Consonant with prior research (e.g., Mulgan et al., 2007; Perrini et al., 2010), our findings reveal that the cognition of an urgent need for tackling a social issue was a key external enabler, which triggered the momentum for scaling the initiatives. Our paper strongly reinforces current thinking on the boosting effect of supportive partners and policy environment (e.g., Morais-Da-Silva et al., 2016; Voltan & de Fuentes, 2016; WHO & ExpandNet, 2009). For instance, for MCR, forging cross-sectoral partnerships and garnering political support heavily affected the successfulness of scaling, especially inasmuch driven to a rapid expansion of geographic coverage. Conversely, SU's scale of expansion appeared capped at that achievable with resources mobilized exclusively through NPOs, individual contributions and volunteering, which resonates with an underlying will to preserve independence from institutional funders.

Our analysis also uncovers novel themes, so far remained on the fringe of current mainstream debate. In particular, the Italian case makes evident that the existence of socio-cultural paradigms less compatible with the initiative being scaled can hinder a large-scale adoption, diminishing community engagement and contributions of resources (Gabriel, 2014; WHO & ExpandNet, 2009). Most importantly, as with other family-centered cultures (Molpeceres et al., 2012), embedding mentoring in the institutional frame offered by the school system and broader educational offerings served to offset some cultural resistance. The study, and particularly the experience of MCR, unveil another issue to be given special attention: social innovation M&E. Evidencing the cost-effectiveness of the intervention was crucial to overcome a number of contextual barriers. Thus, as some already advocated (Larson et al., 2017; WHO & ExpandNet, 2009), scaling processes may benefit from being initiated only once cost-effectiveness had been established. Also, the use of diversified and far-reaching methods of collecting and communicating evidence helped influence stakeholders' opinion on the social issue and persuade them that the innovation is worth adopting and/or supporting. This confirms that communication and knowledge dissemination (Bloom & Chatterji, 2009; Han & Shah, 2020) are actions worth investing in to further foster scalability.

Finally, the study extends current debates on a hitherto understudied research topic: scaling risks. It advances our understanding of the perils that certain strategies, contexts or combination of both can entail. Ultimately, we show that the risks able to jeopardize the success of scaling processes, rather than exclusively inherent to strategic choices, stem out where strategies and context intersect. In sum, environmental conditions do have a strong bearing on the threats encountered. We strongly encourage scaling organizations to consider this when devising their course of action and scholars to corroborate this insight conducting future investigations.

## **6.6 Conclusions**

The magnitude of current pressing social issues adds momentum to debates about social innovation scalability. Our study invigorates research into the contexts, mechanisms and risks of scaling social innovations. In particular, it demonstrates that similar stimuli can trigger very diverse and equally worthwhile scale ambitions, that can be successfully met through dissimilar paths to scale. Most importantly, the comparison helps to pinpoint which factors distinctively enabled MCR to achieve, in a narrow timeframe, such a wide scale of expansion. In part, this is undoubtedly attributable to a great organizational ability to detect key opportunities arising in the environment and use the proper strategic levers to seize them. However, it seems unlikely that analogous strategies could have been deployed by SU and – even if possible – yielding similar results, exactly due to the role contexts played. In Italy, we not only found a cultural framework more resistant to change, but policy-makers also proved to be less effective in shaping a conducive environment for intersectoral collaborations and eased access to resources. In sum, although nature and sample of the enquiry prevent firm conclusions, our findings appear fraught with implications as to both the role that policy-makers can play and the actions that initiatives eager to scale “fast and wide” can undertake.

As we consider the results and merits of this study, it is important to note its main limitations as well. First, we only employed self-report accounts rendered by program managers, which may have limited our ability to achieve an exhaustive and unbiased picture of enablers and barriers. Triangulation of sources and involving external stakeholders would benefit future research. Second, our purpose was

exploring the process of scaling social innovation (i.e., breadth of outreach), rather than its impacts. Thus, an important question for future research is ascertaining what value is delivered to beneficiaries as interventions are scaled. Third, although the comparative nature of the study may offer stronger grounds for theory generation, future evaluations are encouraged to examine whether similar results ensue from applications in further and diverse research settings.

Nonetheless, we conclude by stressing that the study's original contributions surfaced chiefly for two reasons. First, we expressly engaged in a comparative cross-cultural study to contrast scaling processes *across* contexts. Second, we borrowed a conceptual framework (WHO & ExpandNet, 2009) from a cognate field of research: health innovations scalability. This allowed identifying and documenting some influential factors that are less extensively discussed in extant research on social innovation. We argue that enquiries of this kind (namely, comparative, cross-cultural and multidisciplinary) can crucially enhance the understanding of how context-specific variables affect scaling, helping consider which practices best suit a given context.



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## **Chapter 7: Conclusions**

These concluding sections focus on the key learnings and contributions of the thesis. First, the implications of the work carried out for practice and research are outlined. The chapter, then, continues with a reflection on the perils and challenges of evaluation research conducted with(in) NPOs and some ways forward to attenuate identified risks. Finally, it provides an overview of the envisaged dissemination strategy, followed by some personal reflections and final remarks.

### **7.1 Key learnings and contributions of the thesis**

In what follows, attention will be first drawn to the major implications of the studies for managerial and evaluation practice within NPOs. Next, the conceptual and methodological implications for evaluation research on volunteer and community engagement are depicted. In both cases, particular emphasis will be put on the takeaways likely to apply to and be beneficial also for sectors of voluntary activity beyond those specifically considered in this thesis (namely, blood donation and SBM).

#### **7.1.1 Implications for managerial practice**

The findings of such thesis bring into focus the extent to which empirical evaluations as those just illustrated can contribute to our understanding of the drivers of a sustained involvement of community stakeholders, particularly the volunteers, in the programs run by NPOs (objective n. 1). In other words, the studies offered several valuable insights into how NPOs can not only engage more extensively and durably community stakeholders but also maximize the value these stakeholders, as well as the underlying communities, attain.

Firstly, as underscored in many of the previous chapters, clarifying which benefits individuals seek after and actually gain by volunteering proves to be an extremely powerful instrument to inform the managerial practices adopted by NPOs to recruit and retain them. The studies indicated, on a case-by-case-basis, in which domains the outcomes most appreciated by actual volunteers fell. Acquiring knowledge in this respect can crucially enhance NPOs' efforts to widen volunteer engagement, since

better advertising a specific type of volunteering as a way to fulfill these needs can further enlarge the audience of people eager to get involved.

Even more importantly, the evidence reported at chapters 3 and 4 showed that most of the positive outcomes experienced by volunteers were not mentioned with comparable frequency among the reasons to get involved. Prior research has widely stressed the importance of seeking direct insights from volunteers on their initial motivations, to better help them meet their goals and satisfy their needs (Caldarella et al., 2010; Stukas et al., 2013; Stukas & Tanti, 2005; Teye & Peaslee, 2020). Nonetheless, according to volunteers' self-reports, the positive outcomes perceived appear to be, in most of the cases, neither intentionally sought nor seen as a potential by-product of the experience. This leads to the consideration of two scenarios. On the one hand, some psychological or cognitive biases may have caused study participants to omit a number of motivating factors. In this case, some of the outcomes valued ex-post may have been actually pursued all along. On the other hand, if we assume that volunteers reported, at the best of their abilities, all the drivers of their decision to join the programs, we would be facing a genuine lack of awareness about all the benefits that volunteering could afford them. This cannot be ruled out, as prior studies (Bond et al., 2008) show that commonly, individuals undertake personally relevant decisions overlooking a significant part of objectives later identified as influential. In this latter perspective, results stress that, although the primary motivations that prospective volunteers report (or even perceive) may fall within certain domains, outreach, awareness-raising and recruitment campaigns should aim at making potentially interested individuals increasingly cognizant – from the very outset of the engagement/decisional process – of the wide spectrum of gains attainable, as this can add further compelling motives for getting involved.

Equally relevant, findings surfaced from the study at Chapter 5 further add to the reflection, revealing another challenge NPOs can be confronted with. In particular, exploring volunteers' motives and gains may make a NPO aware that actual volunteers feel they accrued specific benefits to a lesser degree than desired (which is reflected in the importance attributed to an item as motive to volunteer). This opposite type of mismatch can be a precursor of volunteer dissatisfaction and disengagement. Hence, evaluation efforts in this direction can help NPOs reduce



volunteer attrition rates, evidencing the need to ensure that volunteers actually realize the gains they anticipated. Not so dissimilarly, the results of the study at Chapter 2 testified that Avis members reaped less benefits than non-members in some domains (i.e., alcohol consumption) and/or were less likely to attribute positive changes to their membership to Avis compared to what non-members attributed to the sole act of donating blood (i.e., smoking, drug consumption and risky sexual behavior). Again, conducting research into volunteers' outcomes turned out to be key to detecting those particular areas where this NPO could enhance the effectiveness of its actions.

Of particular note are also the results concerning the adverse consequences incurred by volunteers as a result of their engagement or the role of factors such as: volunteers' sense of self-efficacy; observing the impact of their efforts; feeling normatively committed to the task. Indeed, with due caution, the considerations drawn can be particularly informative for NPOs that, albeit operating in different fields, require their volunteers to engage in tasks that entail a substantial psychological or emotional burden or in non-occasional relationships with final beneficiaries (e.g., unlike blood donation or telephone counselling addressed to anonymous interlocutors).

In this respect, greater awareness of the extent to which volunteering causes negative emotional states in unpaid workers can make NPOs more willing to transparently disclose to prospective volunteers all the eventualities associated with the decision to volunteer, helping them formulate realistic expectations. Such a form of expectations management, alongside the provision of adequate support when negative unintended outcomes occur, can be key to reducing the risk of volunteer burnout and disengagement. This conclusion was somewhat echoed in the accounts of some study participants (Chapter 4), who revealed that they would have appreciated a less 'sugarcoated' communication, on the part of the NPO, about the challenges and difficulties they were likely to face by engaging in mentoring. In other words, the emphasis on positive thinking should be carefully balanced against the need not to create unrealistic expectations, destined to be disappointed.

Moreover, the studies extensively evidenced that volunteers' overall perception of the experience is heavily dependent on the confidence in their ability to make a positive impact or the chance to actually observing it. Similar findings reveal the vital importance, for NPOs, to regularly inform volunteers about the effectiveness of their contributions, intensifying the assistance provided when positive impacts take time to materialize, or volunteers underestimate their actual scale.

Finally, some of the studies (particularly those illustrated at chapters 4 and 5) showed that, particularly in the context of voluntary work that involves the establishment of a relational bond with the recipient of the gift, some volunteers may be willing to continue volunteering – even if dissatisfied with the experience – due to a sense of moral obligation. Although this can improve volunteer tenure in the short-run, the longer-term effects of dissatisfaction on volunteer attrition rates should be constantly considered by NPOs, hence urged to pay due attention to the extent to which “normative commitment” drive the intention of their volunteers to stay.

Last, but not least, thanks to the comparative nature characterizing the studies at chapters 5 and 6, this thesis is able to make a further point, deemed essential to strengthen the effectiveness of the managerial practices undertaken by NPOs to escalate volunteer or community engagement in their programs. Indeed, these studies corroborate the (apparently trivial) idea that the same actions, put in place in different settings, can yield quite different results, or that different settings may require unlike actions to achieve comparable outcomes. In essence, NPOs should refrain from a-critically adopting practices found to be effective in highly diverse contexts and, whenever possible, conduct ad-hoc research to benchmark their *modus operandi* against current knowledge about documented best-practices. Scholars, in their turn, should promote more fundamental comparative research, critical to advance the understanding of what, in a given context, most enhance the effectiveness of the practices adopted to manage volunteers or take an intervention to a larger scale.

### **7.1.2 Implications for evaluation practice**

The findings reported within this thesis have a number of implications that also relate to the improvement of our understanding of the potential of evaluation in the setting

of volunteer-based NPOs (objective n. 2). More specifically, this thesis contributes by leading to a better conceptualization of the multiple purposes that research into how NPOs can enhance volunteer and community engagement can fulfil.

Using the words of Benjamin & Campbell (2014), a point of departure of this dissertation was that: “*So far [...], frontline work has received little attention in the debate over how best to measure nonprofit effectiveness*” (p. 44). Echoing the authors’ reflections, it can be claimed that giving scope exclusively to beneficiaries’ outcomes, as too often happens in mainstream evaluation models, hides the risk of neglecting other essential aspects of how NPOs serve communities and function within an ecosystem. More specifically, the “programmatic legacy” of default evaluation models – which results in overlooking factors other than the intervention and its direct outcomes – has several problematic fallouts. Among these, we can mention the depiction of volunteers as mere inputs to programs, production factors or, at best, program implementers, rather than fully-fledged participants or an ulterior target of the intervention (McGill et al., 2015). This results in overlooking the agency they exercise in the design and delivery of services and in driving change for the benefit of final beneficiaries or, equally relevant, a whole set of positive outcomes that programs can deliver (Meltzer & Saunders, 2020). In sum, a key point this thesis intended to make is that NPOs should readily and willingly expand the scope of the reference frameworks used to assess and communicate their contributions (Benjamin & Campbell, 2014). In fact, this would return a more accurate picture of the scale of the transformational change and social returns produced, as well as the sources and routes of their achievement.

Going back to the premises driving this thesis, it is believed that the studies presented contribute to demonstrate that evaluation practices not strictly focused on “downward” stakeholders (Christensen & Ebrahim, 2006) – that is, the beneficiaries – have the potential to serve functions that span from program improvement and knowledge development to the assessment of a program’s merit and worth, as well as oversight and compliance (Mark et al., 1999). Indeed, as others argued (Manetti et al., 2015) studies of this kind operate on a twofold level. First, they represent effective tools of internal control for NPOs, generating *knowledge* about the drivers and mechanisms that boost stakeholder engagement in their activities and *improving*

a program's efficiency and sustainability, as able to highlight possible inefficiencies in current managerial practices. Second, and less frequently recognized, they enrich the debate about the socio-economic value generated for stakeholders and the society at large. Indeed, they allow NPOs more thoroughly *assessing* and *oversighting* a number of positive externalities which involve not only the final users of their services and products, but also their volunteers and wider communities. Achieving such a fairer representation is a crucial step to properly report to stakeholders the actual value of a NPO, of paramount importance in the face of a context wherein the competition to access constrained resources keeps growing (Meltzer & Saunders, 2020).

A second, relevant and correlated point to consider is that one critical component of the contribution made by NPOs consists of connecting beneficiaries with resources that lie beyond the boundaries of any given program/organization, as held by third parties. Within traditional evaluation practices, the effectiveness of a NPO in carrying out this "linking work" (Benjamin & Campbell, 2014), as well as the value stemming out of it, are rarely studied or factored in. Also, the role played by external stakeholders (e.g., partnering organizations, funders, governments, etc.) in achieving intended results – and to a meaningful scale – is too frequently left beyond the scope of current evaluation research. The study illustrated at Chapter 6 precisely intended to account for the role that NPOs play by serving as a portal to connect participants to other system players and piece together various constituencies to address a particular social issue. The evaluation contributes to show that the effectiveness of NPOs in responding to contextual opportunities or barriers and in devising strategies to operate on a larger and larger scale can crucially affect its success and sustainability, facilitating or hindering the enlargement of its breadth of outreach (and, in principle, the direct impacts generated). In sum, as argued by Benjamin & Campbell (2014): "*when we judge the effectiveness of an organization solely by its programmatic outcomes, we risk misunderstanding the factors that determine the success or failure of that organization*" (p. 45). In other words, only by acknowledging that a program's direct outcomes are only one among the many ways in which they contribute to collective welfare, NPOs can achieve a deeper

understanding of how they function (and how successfully) within a wider ecosystem.

### **7.1.3 Conceptual implications for research**

This section now delineates the conceptual contributions that the thesis wished to put forward, which are deemed valuable particularly for the broader area of research dedicated to the study of pro-social behaviors.

One of the reasons why giving, and by extension volunteerism, have long fascinated and captured the interest of economists, is the apparent irreconcilability of these gestures with the principles of rationality and utilitarianism assumed to govern the choices of economic agents. Put it simple: *“From an economic point of view, volunteering is a paradox”* (Hustinx et al., 2010, p. 415), since – when conceived as an act of genuine altruism – it would entail that a person decided to engage in an activity even if the costs borne exceed the benefits reaped. Most of the studies illustrated in this thesis intended to show that embracing the concept of “impure altruism” (Andreoni, 1990) paves the way to reconciling such acts of giving with rational-choice and economic theories, finding an escape route from the abovementioned paradox. Indeed, acknowledging the co-existence of altruistic and self-interest reasons to engage in voluntary work – foundational principle of the functional approach (Clary et al., 1998) – implies seeing the volunteers as drawn to both the private and public benefits that volunteering can yield. In such a perspective: *“volunteering, enters the individual’s utility function twice: once as a private good and once as a public good”* (Hustinx et al., 2010, p. 416). This argument is the key to understanding why extra-welfarist economics appears to be the most coherent conceptual frame for positioning the studies presented. While, in welfarist economics, the evaluative space is confined to the exclusive consideration of individual utility, extra-welfarism rejects the idea that the latter is the sole outcome of interest of evaluations (Culyer, 2012). Individual utility is not excluded from the equation but, rather, supplemented with other sources of welfare, such as the happiness, freedom, honesty of individuals, the quality of their social ties or the fairness of the distribution of welfare within societies. It is then up to evaluators to

develop models which allow these important non-goods to be entered meaningfully in the evaluative space.

#### **7.1.4 Methodological implications for research**

Finally, the conceptual (and even philosophical) underpinnings of the studies had strong implications in terms of the methodological approaches adopted for their execution. These latter, in turn, present many interesting features for the wider stream of evaluation research conducted by and within NPOs. Indeed, the multi-methodological nature of the thesis provided an opportunity to demonstrate strengths and merits of a mix of evaluation techniques, whose applicability easily extends to NPOs operating in fields different from those here considered.

The evaluation presented at Chapter 2 provides an unprecedented application of the SROI evaluation framework for the assessment of the varied impacts of the blood donation experience and, most importantly, for substantiating the role played by BDAs in the generation of value to the benefit of their members and the society as a whole. First, this study perfectly exemplifies how volunteer-centered evaluations can simultaneously act as internal control and accounting instruments (Manetti et al., 2015). Indeed, although the considerations made at paragraph 7.1.2 of this chapter apply to all the studies presented, the second function indicated becomes particularly apparent in the case of evaluation techniques such as the SROI. The evaluation conducted primarily attempted not only to report the positive impacts accrued to Avis members but to express them in the form of a quantified *monetary value*. What is worth stressing is that examining the costs and benefits of the investments NPOs make in the volunteers and their strategic management can not only contribute to the improvement of the efficiency and sustainability of their interventions (revealing potential inefficiencies to redress), but also become a deal-breaker in the bargaining with resource providers. Second, the novel application of this method allowed filling numerous gaps in the health economics literature, as well as with respect to social impact evaluations populating nonprofit research (Ricciuti & Bufali, 2019). Indeed, a great deal of the innovativeness of this evaluation study lies in having included in the evaluative space some *soft impacts* of volunteering (namely, boosting volunteers' social or human capital and 'giving culture'), most distinctive of Avis work

compared to that of publicly-run BCAs. While these fallouts of NPOs interventions are frequently intuitively acknowledged, they are more elusive to established measurement techniques and, hence, often overlooked in socio-economic evaluations. The quantification approaches proposed offer a point of reference which can allow NPOs to add soundness and credibility to the debate around the value generated by their interventions. In sum, this study shows that broadening the lens and toolkit through which NPOs view, assess and communicate the work they conduct to achieve outcomes for participants is, *in primis*, instrumental to achieving – more efficiently and sustainably – those direct outcomes. However, it can also prevent from missing a good portion of the value delivered and the undesirable consequences this would have when it comes to obtain financial and operating resources.

As to Chapter 4, from a methodological standpoint, a great deal of its original contribution to empirical research consists of having put forward a robust and novel PTDE approach (i.e., Logic Analysis) deemed particularly promising when it comes to investigate a hitherto little-explored issue (namely, the ways in which volunteers navigate their experiences) and to promote open discussions on this amongst program stakeholders. More specifically, it is believed that the value of PDTE for NPOs lies in making the output of the evaluative process more comprehensible and appreciable for a broader array of internal and external audiences. Also, being relatively less methodologically demanding and resource-intensive than other types of empirical evaluations, it is well suited to serve as a point of departure in the process of establishing and demonstrating program success. At the same time, nonetheless, thanks to the systematic character which differentiates Logic Analysis from other qualitative research methods, NPOs can gain a detailed view of the extent to which the design/implementation of their programs diverge from the standards endorsed by pertinent literature. This, in turn, can help them detect strengths and weaknesses of their operating models, as well as the corrective actions that can redress any malfunctioning. Equally relevant, this study, alongside the review at Chapter 3, stood out for having offered an unprecedented application of the SODA mapping procedure for the purpose of developing program theory with respect to the volunteer experience. As already argued, its use allowed showcasing the believed

superiority of this technique over alternative and more conventional approaches (e.g., McGill et al., 2015). In many instances, prior studies aimed at providing heuristic tools which, for the sake of parsimony, end up returning an overly simplistic and linear representation of processes that are, conversely, complex, dynamic, situation-dependent and even idiosyncratic in nature. By contrast, the SODA method can return a very detailed representation of the process being studied (respectively Appendix B of Chapter 3 and Appendix C of Chapter 4), portraying how its discrete constituent elements influence each other and when/how to intervene to direct the process towards desirable outcomes. Equally relevant, it can also help locate potentially diverging perspectives about how an intervention is supposed to work.

Finally, another noteworthy and more transversal methodological implication emerged from the results of previous studies concerns the well-known and widespread measurement instrument of the Volunteer Functions Inventory (Clary & Snyder, 1998). Although a variety of assessment methods have been developed to explore volunteer motivations and rewards, the VFI is by far the most widely used one, having become, in a certain sense, the dominant standard (Chacón et al., 2017). The studies at chapters 3, 4 and 5 make an original contribution by documenting some novel motivational or outcome domains, which – albeit standing outside the boundaries of this inventory – turned out to be particularly salient in the context from time to time considered (e.g., “community concerns”, “sensitizing experiences” or the spillovers on other mentors’ relationships). Even more importantly, in Chapter 3, it was noted that overlooking these themes would have returned a distorted representation of the viewpoints of those who mentor within educational settings. Indeed, only when these novel themes were considered, altruistic motives and outcomes went back to being among those most frequently reported. These evidence-based observations allow arguing that, whatever the field considered, researchers should wonder about and ascertain whether the VFI actually represents an exhaustive and appropriate instrument to account for all the functions served by a specific type of voluntary activity. Indeed, the studies clearly showed the perils of relying blindly on validated instruments.



## **7.2 Perils and challenges of evaluation research**

Having extensively discussed the potential that conducting evaluation research holds, I rather devote this section to the description of the greatest challenges and threats that can – in my view – undermine it in practice. Nonetheless, I feel compelled to make the necessary premises. First, it should be borne in mind that the circumstances described below by no means refer to the interactions personally had with the NPOs involved in the previous studies. Instead, it is about a wider critical reflection on the worst drifts of evaluative practice, which is to say those worst-case scenarios that may occur and that, if not adequately addressed, can jeopardize the success of any research projects. Second, it has to be made clear that the ultimate intention of this section is to provoke a constructive debate. Indeed, it is hoped that this can increase the chances that the joint effort between academe and practitioners results in research outputs of greater transformative power, improving the relevance of its findings and their ability to affect decision-making, practice and contribute to the solution of some of society's most pressing problems.

As widely documented by prior research, a mixture of impeding factors can concur to impair evaluation practice within NPOs and its potential (e.g., Cordery et al., 2013; Hardwick et al., 2015; Millar, 2020; Ricciuti & Bufali, 2019). Commonly acknowledged issues arise from the fact that undertaking evaluation studies often requires the gathering of data diverse from those routinely collected by NPOs. This additional burden conflicts with the resource/capacity constraints (i.e., lack of time, expertise, funds) often characterizing NPOs, which can further limit the ability of NPOs to commission scholarly research or access its findings, applying them to their practices and organizational context. Moreover, competing priorities and rival agendas can further complicate and jeopardize the endeavor. NPOs professionals may have different goals for project outputs or standards of knowledge (i.e., experiential vs academic; substantive/subject vs technical) from those held by the external evaluators, which may result in organizational cultures that attach lower priority to evaluation as opposed to the execution of activities seen as better able to secure mission achievement (Ricciuti & Bufali, 2019). If we narrow down the reflection to evaluation research not strictly focused on “downward” stakeholders, the array of hindrances further expands, including – as already illustrated – the

difficulties in reconciling competing accounting pulls, with excessive attention being given to the requirements imposed by funders (Benjamin & Campbell, 2014; Christensen & Ebrahim, 2006; Tenbensen et al., 2014), perceiving evaluation as able to accomplish, at best, limited functions (Mark et al., 1999) or the very reluctance of some internal interest groups to get involved (Benjamin & Campbell, 2014). Moving beyond the possible and varied causes of the problem, I now draw attention to some of its worst consequences, before delineating some recommendations deemed essential in taking some steps forward.

*Instrumental and a-systematic use of evaluation:* Given the barriers just enumerated, it can happen that NPOs come to view evaluation as “*a burdensome funding requirement, rather than as a practical tool to help improve their work*” (Benjamin & Campbell, 2014, p. 42). In other words, among the worst-case scenarios, there certainly is seeing NPOs willing to engage in evaluation on the condition that this serves as a “positioning tool” (Flinders et al., 2016), enhancing their reputation, legitimacy, market position or political influence. From viewing evaluation studies simply from an instrumental point of view a number of perils ensue, such as missing out the role research can play in feeding organizational learning and improving programs’ effectiveness and sustainability. Similarly, evaluation risks to end up being seen as a one-shot activity, to be engaged in when the opportunity (or need) arises, rather than as an ongoing and necessary monitoring effort. This may contribute to explaining the frequent provision of relatively too short time frames for the conduction of studies, usually not intended to be longitudinal or backed up by follow-ups, one of the major limitations of research as a whole.

*Power imbalances in knowledge co-production:* Past research has extensively emphasized the importance of co-production, a rapidly spreading practice which entails the involvement of NPOs in the knowledge generation process and the design and conduction of evaluations (Hardwick et al., 2015; Ricciuti & Bufali, 2019). Co-productive research processes are, indeed, widely advocated as a necessary ingredient in scientific research aimed at transforming current practices and decision-making processes (Lemos et al., 2018). Nonetheless, some tensions can be reinforced, to some extent, by the dynamics and power structures surfacing in the context of participatory evaluative processes.

For instance, NPOs' staff members and evaluators can have difficult interactions as they both feel they lack the expertise, attitudes and mutual understanding of respective contexts required to co-produce an evaluation study (Lemos et al., 2018). Furthermore, the research partners (i.e., the NPOs) may well be in a position of greater power, considering that they act as gatekeepers for accessing study participants, "*who can either let you in or stop you from reaching certain knowledge or opportunities*" (Flinders et al., 2016, p. 272). Such a power differential can be exploited by NPOs to impose conditions (e.g., as pertains to the study sample, design and instrumentation), often more on the grounds of management-oriented logics than in the pursuit of academic rigor. As a result, academics, who depend on the engagement of partnering NPOs for the successful completion of the project, may be in the position of having to accept compromises or sub-optimal solutions, to secure their commitment throughout the research process. In sum, the agendas of NPOs, far from being inert, can heavily shape and direct knowledge generation processes. Thereby, evaluators can be exposed to significant risks which – always in the worst cases – may put them in the inconvenient position of disregarding dominant scientific quality standards or compromising the independence of their research (Flinders et al., 2016). Even more explicitly, the risk is that research is conducted in the ways NPOs want and designed to confirm what they want to hear, based on preconceived beliefs about what the right responses to be provided are.

Finally, a related point to draw attention to pertains to how dealing with paying or non-paying research partners affects these power imbalances. Indeed, the lack of organizational commitment to valuation (Cordery et al., 2013) can be exacerbated in circumstances where the NPO is not investing its own available resources to conduct research. Not taking a stake in these activities can make it easier for NPOs to dig themselves out of the deal and the interest in the successfulness, significance and quality of research outputs may be somewhat reduced. Research has, indeed, shown that the evaluative rigor of conducted studies is the highest when these latter are "internally motivated", which means perceived as a priority and required – and, therefore, more likely paid for – by the management of a NPO (Mitchell & Berlan, 2016).

Overall, as painful as it is to conclude with such a pessimistic observation, failing to manage these dynamics effectively can make co-production: “*a risky method of social inquiry for academics*”, in that “*It is time-consuming, ethically complex, emotionally demanding, inherently unstable, vulnerable to external shocks, subject to competing demands and expectations, and other scholars (journals, funders, and so on) may not even recognise its outputs as representing ‘real’ research*” (Flinders et al., 2016, p. 266).

*Potential distortions of competition:* A final note concerns the distortions to evaluation research deriving from the competition it, in turn, allows. Indeed, it is also necessary to highlight an equally significant challenge, which – albeit external to any single NPO – concurs to the impoverishment of the evaluation research efforts within the nonprofit sector: the difficulties in involving suitable comparators. Public providers of services comparable to those offered by NPOs may prove to be reluctant to enable and engage in analyses aimed to compare their cost-effectiveness to that of their private counterparts. The lack of a comparator clearly prevents from firm conclusions about the actual and differential value generated by a NPO. If we put ourselves in the shoes of a less cost-effective public service provider, this may be desirable (as enabled to co-exist in the system, without severe shocks or calls for change), but it is not that much so from a societal standpoint.

### **7.2.1 Ways forward**

That being said, it is worth enumerating some recommendations which can, hopefully, help attenuate the risks just described, enhancing the ability of evaluation research to have an impact.

*Bear in mind the many advantages of evaluation:* It is well-known that entities external to NPOs (e.g., funding or government agencies, donors) increasingly subordinate the provision of support – first and foremost, financial – to the ability of NPOs to be accountable and document the merits and impacts of their interventions (Mitchell & Berlan, 2016). This is a matter of fact and not, per se, problematic. Nonetheless, a way out from many of the issues previously described would simply come from NPOs stopping seeing evaluation as a mere (and bothersome) funding requirement to be met, without losing sight of its other and equally relevant

advantages, such as: be assured that the interventions implemented actually achieve intended results, enhancing the positive impacts accrued to users, employees and volunteers, etc. (Hardwick et al., 2015).

Conduct ad-hoc and ongoing evaluation: Extant research evidence and guidelines about best practices do represent a relevant source of evidence to inform an interventions' design and implementation. Nonetheless, the reliance on information from programs underway in other contexts – especially if highly different – should not supplant ad-hoc research, whose output is, unfortunately, too often seen as not as relevant for NPOs' daily operations (Hardwick et al., 2015). Alongside stopping viewing the “borrowing of ideas” as a privileged source of knowledge, it is important for NPOs to recognize that one-shot (i.e., cross-sectional) evaluations, albeit more feasible and less resource-intensive, are nothing but a snapshot of the situation at a given point in time and, fundamentally, ill-suited instruments to interpret any detected effects as causal. Hence, funders and policy-makers may see such studies as unable to produce the conclusive empirical evidence sought, which might disempower the evaluations and lessen their overall usefulness.

Narrow the “research-practice gap”: Researchers, for their part, should do everything that is within their possibilities to facilitate the generation of high-quality research knowledge and the actual use of research findings. For instance, albeit trivial, to prevent other priorities from getting in the way of designing and conducting sound studies, they should take the time to explain – in an accessible manner – how certain methodological steps can enhance a piece of research, contributing to making it of real use for the practical work NPOs conduct. Another viable solution may simply require the production of user-friendly summaries, evidence synthesis or briefings and the provision of clearer guidance on how to apply findings to practice, reducing the time needed to access and comprehend evaluation research (Hardwick et al., 2015). Trained evaluators adopting a more practitioner-oriented perspective can further narrow the gap (Millar, 2020). Facilitating research use may also require building internal capability, with the appointment, within NPOs, of professionals with the responsibility and technical expertise to collaborate in (if not, even, autonomously carry out) the design, implementation, quality appraisal and interpretation of conducted research (Bach-Mortensen et al., 2018;

Hardwick et al., 2015). This can help to reduce “boundary-crossing” as well, allowing the spread, within NPOs, of a culture more pluralistic, inclusive and respectful of diverse know-hows.

Set effective incentives to partake: Finally, to ensure that both private and public providers of welfare services partake in comparative research, setting the right incentives may be required. As neither party may be willing to spontaneously engage in research promoted by a “competitor” (especially if the interests at stake are high), evaluation studies should be promoted by those in a *super partes* position: the funding or regulating bodies to which both the genres of actors respond. However, this would prove effective only in presence of levers exploitable to enforce, to some extent, participation. Otherwise, the risk is that both parts, as not directly investing in research activities or internally motivated, find themselves in the position to kindly refuse to take part in the operation.

In conclusion, I am certainly aware of the utopian character of the state of the world just described and that multiple hindrances – of various kinds – can prevent the implementation of the actions recommended (summarized at Table 7 – 1). Nonetheless, I definitely consider there to be tremendous value in encouraging a paradigm shift and the implementation of joint actions to counteract those drifts, especially in light of the practical, conceptual and methodological advancements that evaluation research can bring about, as the learning generated by this thesis attests.

**Table 7 - 1 Drifts of evaluation practice and ways forward**

Drifts	Recommendations
Instrumental and a-systematic use of evaluation  +  Power imbalances in knowledge  co-production	Bear in mind the many advantages of evaluation
	Conduct ad-hoc and ongoing evaluation
	Narrow the “research-practice gap”
Potential distortions of competition	Set effective incentives to partake

### 7.3 Dissemination plan

This section briefly outlines the dissemination strategy envisaged for the research outputs presented from Chapter 3 to Chapter 6<sup>24</sup>. The plan has been devised with a view to maximize the potential impact of these studies by means of targeted dissemination activities. Indeed, a number of opportunities for internal and external communication can be identified, which entail both publishing and presenting results in academic outlets and engaging in discussions with relevant stakeholders beyond scholarly circles. To this end, four main target groups have been identified:

1. Academic community, and particularly scholars concerned with the issues of:
  - 1.1. evaluation of NPOs' interventions and social innovation;
  - 1.2. volunteer management within youth mentoring programs;
2. Practice-based community, comprising both:
  - 2.1. practitioners in the youth mentoring field, in primis, those operating within the two schemes involved in the studies;
  - 2.2. volunteers of youth mentoring programs, especially those belonging to MCR and SU.

In light of the practical, conceptual and methodological implications discussed in the preceding chapters, the next table (Table 7 – 2) provides an indication of the presumed interest, in each study, on the part of these four distinct groups, to which some specific dissemination activities can be addressed, as illustrated below.

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<sup>24</sup> Chapter 2 is not included because its dissemination has already taken place.

**Table 7 - 2 Interest on the part of targeted groups in each chapter**

		Academic community		Practice-based community	
				Professionals	Volunteers
		Evaluation/ Social Inn.	Youth mentoring		
Chapter	3		✓		
	4	✓	✓	✓	✓
	5		✓	✓	✓
	6	✓	✓	✓	

*Academic community*: Starting from the first research area identified (namely, evaluation and social innovation), chapters 4 and 6 are those believed to provide insights, as well as empirical and methodological contributions, expected to be of interest also for scholars beyond the “mentoring movement”. Accordingly, the publishing process in high-quality academic journals, which are not subject-specific, has already been initiated. In addition to this, a number of annual conferences addressed to evaluators working in and with the nonprofit sector, or conducting research into socially innovative initiatives, can provide a further outlet to discuss study findings and/or methodological strengths. Striving for a good balance between events of international scope and national character, promising opportunities may be represented by the: International Society for Third-Sector Research (ISTR) International Conference [July]; International Association for Volunteer Effort (IAVE) World Volunteer Conference [October]; International Social Innovation Research Conference (ISIRC) [September]; UK Evaluation Society Annual Conference; Scotland’s Third Sector Research Forum (TSRF) [February]; the Iris Network’s “Colloquio Scientifico sull’Impresa Sociale” [June]. Nonetheless,



seeking a greater integration between academic research and practice, these studies may also lend themselves to presentations addressed to the scientific community within the University of Strathclyde or other ones. These, for instance, can take the form of workshops on how to perform a Logic Analysis using the SODA mapping technique, or of peer-sharing thematic roundtables, as already happened on the 24<sup>th</sup> of November 2021, on the occasion of the “Fresh Faces - Fresh Ideas” festival, promoted by the Hunter Centre for Entrepreneurship of the Strathclyde Business School.

As to the academics specifically engaged in youth mentoring research, their interest is presumed to extend *also* to the review article and the mixed-method study illustrated at chapters 3 and 5. The former, albeit initially conceived as instrumental to the conduct of the Logic Analysis (Chapter 4), generated valuable insights on its own. Hence, it was deemed publishable as a stand-alone piece of research and, potentially, relevant to those scholars who may want to get a sense of the level of development or gaps characterizing previously published research on the topics considered. At the same time, results can be embedded in fresh evaluations, enabling the identification of the specifics/commonalities of volunteer management within a given mentoring scheme with the trends highlighted by the review. Despite the potential glimpsed for publishing that paper in an academic outlet, the learning generated is considered of greater value for the readership of a journal which collates contributions specifically focused on mentoring, as the one to which the article has been recently submitted. Instead, the latter paper (Chapter 5) will be submitted to a journal that, albeit not strictly focused on mentoring, welcomes contributions that, comparatively and cross-nationally, are concerned with volunteerism and NPOs management practices. Furthermore, for all the four chapters, some international meetings can provide a forum to meet and engage with experts in the field, such as the: International Mentoring Association (IMA) Conference [February]; National Mentoring Summit [January]; Mentoring and Advising Summit [March].

*Practice-based community*: The practitioner-oriented summit meetings just mentioned can afford an opportunity to intercept professionals and volunteers within the “mentoring movement” as well, and to share with them the insights and learnings generated. Also, some activities may be addressed – in the first place – to the

managerial teams of the two mentoring organizations which participated in the studies. In particular, chapters 4 and 5 are complemented by thorough codebooks that exhaustively report all the interview excerpts coded throughout the analysis. These materials – deemed tremendously valuable for those managing the programs – have been made available to the two organizations, given that they summarize – on a theme-by-theme basis – evidence beyond that discussed in the final research articles. Hence, these sorts of ‘catalogues’ can be further explored by program directors to find out what their volunteers’ narratives around a given issue are. Moreover, the original research articles prepared for publication have been shared, from time to time, with the organizations. This has been done in order to provide staff members with an opportunity to review the write-up of the studies, to question (or challenge) and reflect upon findings and their connection to set routines and managerial practices, as well as to provide feedback to be incorporated in data interpretation and reporting. In the near future, the organizations will be in the position to further circulate these studies with all those potentially interested, including actual and prospective mentors and those who took part in research. Nonetheless, an effective dissemination of research findings requires to take into account that not all the members of practice-based communities are willing and eager to engage with scientific articles. Hence, it is deemed appropriate to share the knowledge gained and discuss research results and implications also by adopting dissemination tools more accessible to these stakeholders. This may entail preparing non-technical summary reports (in the users’ native language) and envisaging short presentations to be held, for instance, during the conventions arranged annually by these organizations. Finally, considering a wider dissemination to be an important aspect of my responsibilities as a PhD student, I would be thrilled to welcome additional dissemination opportunities that MCR and SU may suggest to widen the audience attainable and involve other mentoring organizations potentially interested in engaging in the debate.

#### **7.4 Personal reflections**

Sharing some considerations about the ways in which my PhD experience enriched me and shaped my professional aspirations for the next future feels like the best and

most natural way to conclude this thesis (and path). Hence, in what follows, I will highlight the manifold sources of growth that I believe contributed the most to my development as a young researcher, which boil down to having worked with: i) NPOs; ii) other researchers, research problems and multiple evaluation methods.

*Working with NPOs:* As this whole thesis proves, much of my learning took place through and thanks to the close collaboration with NPOs for the purpose of conducting evaluation studies. There is no need to hide that this put me in the position to face some challenges, at times. Most importantly, it made me increasingly aware of the need for researchers to constantly engage in balancing actions aimed at preserving both the academic soundness and rigor of their research and the practical usefulness of the latter for the work that the commissioning/partnering NPOs carry forward. What I've learnt, like other PhD students who preceded me (Millar, 2020), is that ensuring that a piece of research turns out to be genuinely mutually beneficial tends to require a great deal of negotiation, oriented to building a reciprocal understanding of the meanings, objectives and expectations respectively attached to the research to be co-produced. This, in more practical terms, means/has meant to me developing a number of skills. These include, for instance, becoming more patient and understanding when it comes to engage in such (often, time-consuming) negotiations, without assuming that my perspectives, approaches or targets are self-explanatory, indisputably superior or such that to not imply any drawbacks (e.g., adhering to the original wording of validated scales at the expense of the comprehensibility of items for study participants). These recent experiences also helped me understand that I should keep constantly in mind that the data collection instruments developed should not only meet my own wish to gather exhaustive information but also the real (and not hoped-for) time availability of targeted participants. Finally, they enhanced my consciousness of the necessity to plan in advance to allocate adequate time to activities oriented to maximize the accessibility and actual use of research findings (e.g., sharing written research outputs and encouraging feedback, presenting them in ways approachable for non-academics, producing streamlined summaries or guidelines on how results can affect daily practices).

*Working with other researchers, research problems and multiple evaluation methods:* Both encouraged by my supervisors and on my own initiative, throughout my PhD, I sought after as many as possible opportunities to work closely with other researchers, some of whom ended up being co-authors of the papers progressively written. These collaborations provided formidable opportunities for knowledge exchange and for building on each other's strengths, expertise and know-how. Furthermore, it has been key to honing my presentation, reporting and writing skills (thanks to the constructive feedback provided), gaining experience of academic publishing, changing my ways or views and being better able to position my studies in the wider literature, while acknowledging both their merits, original contributions and flaws. At the same time, I am grateful for having being offered the opportunity to be involved in various lateral research projects, which recently culminated in the publication of two research articles (Kung et al., 2021; Millar et al., 2021). These latter led me to engage with experts both internal and external to my home institution and address research problems in cognate fields of enquiry (i.e., Health Technology Assessment), learning about some of the challenges facing evaluation research and practice from a different angle and with renewed perspective. Ultimately, it goes without saying that my overall PhD and development as a researcher would not have been the same without all these intellectual stimuli. However, I have to acknowledge that testing myself against research focused on evaluation in the health sector also made me more cognizant of how crucial it is to participate in projects that truly interest and motivate you, as well as more comfortable in being assertive when it comes to "choosing your battles". This is a lesson I will treasure in the future. Last, and perhaps more obvious, during these years, I have been able to apply a variety of methods and techniques, which ranged from the SROI, to the Theory of Change and SODA mapping, to regression-based and confirmatory factor analyses. At the same time, I had the opportunity to become more familiar with the features and potential applicability of analytic approaches other, such as finite mixture modelling, generalized structured component analysis, as well as propensity score, synthetic control or pseudo-panel methods. All this allowed me to build more robust practical evaluative skills, on which I truly hope to build in my future career.

In this respect, recently, I've been frequently asked about my plans for the future and the ultimate goal of all this. I must confess that, at this point in time, the answer is still taking shape. Even though I am not ruling out the possibility to apply for an academic position, these past years helped me realize that what truly matters for me is the perception that my work has a tangible, positive impact and can be relevant, beneficial and of real use for those involved in/reached by it. I will never forget the sense of gratification I experienced when one of the NPOs involved in the research shared with me a document listing all the concrete measures that, based on the study findings, would be taken to improve their program. Seeing your research published feels good but this was priceless (at least for me). So, borrowing my supervisor's words, I still feel like the kind of researcher "*who may have to decide whether to present herself as predominantly an academic researcher (who happens to do consultancy) or as predominantly a consultant (who happens to have theoretic interests)*" (Morton, 1999, p. 220). Despite this, there's no doubt that it is my firm intention to keep conducting evaluation research with NPOs and into social interventions, innovations or enterprises. In the same way, I am sure that – whatever the hat I will decide to wear – this whole journey made me far better equipped to achieve this goal.

## **7.5 Final remarks**

The various studies illustrated in this thesis were intended to showcase the promises of evaluation research when it comes to allowing NPOs to gain a more profound understanding of the ways in which the engagement of community stakeholders, particularly the volunteers, can be made wider and more sustained. Discussed findings added to our comprehension of both what drives the continued involvement of stakeholders in the value-creating programs NPOs run, as well as of the (too often untapped) potential of evaluation carried out in the setting of volunteer-based NPOs. As better disclosed within this concluding chapter, in addressing this twofold research objective, the thesis actually wished to give renewed impetus to a franker dialogue and more fruitful collaboration between academe and communities of practice. This, in fact, is seen as key to increasing the practical, conceptual and methodological advancements brought about by any conducted studies, as well as the

ability of these latter to transform real-world decision-making and practice. As these concluding sections wanted to highlight, it is a common responsibility of both those commissioning and executing evaluation research in this field to ensure that it is carried out in less inconsistent, opportunistic, narrow-minded and inconclusive ways. Failure to do so would, at best, mean reducing to a promotional tool what, in reality, should spring from the ambition of delivering effective and actionable solutions to some of the most pressing societal issues of nowadays.

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## Appendices

### Appendices Chapter 3

#### Appendix A

#### Coding frame and illustrative quotations from the thematic analysis of extant literature

Notes:

- Orange used to indicate the themes not discussed in any of the sources analysed.
- Blue used to indicate the themes deemed primarily/uniquely salient in the field of mentoring in higher education (HE) institutions.
- “NA” signals that the theme is discussed in one or more studies but we lack a relevant quotation (i.e., it was either assessed quantitatively or narratively discussed by the authors).

**Table A.1 – Volunteer Functions Inventory Motivations**

Sub-themes (provisional)		Sub-themes (final or level II)	Illustrative quotations (if available)	Source
<b>Theme 1 - Values:</b> Expression of important prosocial and humanitarian values, such as altruism or compassion.				
1.1	I was concerned about those less fortunate than myself	I felt compassion (or empathy, concern) toward people/youth in need.	NA	-
1.2	I felt compassion toward people in need			
1.3	I felt it is important to help others	<b>a)</b> I felt it is important to commit to helping people out. <b>b)</b> I wanted to make a difference/impact in a young person’s	“I think mentoring and really committing to helping people out, it’s a fundamental thing that we can do [...].”	Limeri et al., 2019, p. 7
			“I just kind of thought it’s something that I want to be a part of and it’s this feeling of just helping someone out.”	Raven, 2015, p. 285
			“I guess I wanted to make a difference in a kid’s life [...].”	Tracey et al., 2014, p. 55

		life.	“I would like to try to make a positive difference to a young person's life [...]”	Fassetta et al., 2014, p. 12
1.4	I am genuinely concerned about the particular child I will mentor			
1.5	I can do something for a cause that is important to me	a) To help a young person into growing or learning something (e.g., a subject, a skill).	“I guess I wanted to [...] help them read”.	Tracey et al., 2014, p. 55
		b) To help a young person create and progress toward a better future.	[...] “to help create a better future for a child.”	Gettings & Wilson, 2014, p. 1108
		c) To help a young person feel more connected to school or motivated academically.	NA	-
		d) To help a young person work through some issues.	NA	-
		e) To help a young person to have fun and feel socially included.	NA	-
<b>Theme 2 – Understanding:</b> Gaining new perspectives on things or a better understanding of the world, oneself and others through the learning experiences supplied by volunteering.				
2.1	I could learn more about the cause for which I am working	a) I could learn more about the cause for which I am working	NA	-
		b) I could learn more about positive youth development or the target group to work with.	NA	-
		c) I could learn more about a number of social issues facing my community and heighten my political/cultural awareness.	“I don’t want to be an ignorant person and I don’t feel like I have any prejudices at all ... I just wanted to personally come into closer contact with it so I understood for myself what it meant, rather than just – a lot of the ways that Indigenous people are treated in Australia it’s very distant. I just don’t think that’s helpful and I just don’t want to be ignorant about it.”	O’Shea et al., 2013, p. 400
2.2	Mentoring could allow me to gain a new perspective on things	Mentoring could allow me to gain a new perspective on things or overcome some preconceptions.	“I wanted to broaden my horizons”.	Wasburn-Moses et al., 2014, p. 79
2.3	Mentoring could let me learn things through direct, hands on experience	Mentoring could let me learn things <sup>25</sup> through direct, hands on experience.	It would “help me learn how to build a positive relationship with others. Especially being from foreign country, I can learn more about communication skills.”	Limeri et al., 2019, p. 6
2.4	I could learn how to			

<sup>25</sup> Such as how to communicate, deal/build positive relationships with a variety of people, practice patience, critical thinking or problem-solving skills, etc.

	deal with a variety of people			
2.5	I could explore my own strengths	I could I become more self-aware and learn about my own strengths and weaknesses.	“I’d be able to answer the question, am I just really bad at training students?”	Limeri et al., 2019, p. 6
<b>Theme 3a – Self-help (Enhancement):</b> Feeling of being useful/needed or good about oneself (increase in/maintenance of a sense of self-worth, self-esteem or positive emotions)				
3.1	Mentoring could increase my self-esteem	Mentoring could increase my self-esteem, confidence and sense of self-efficacy.	[I wanted to] “Become more confident with people that are different from me” or “Increase self-confidence”.	Hughes & Dykstra, 2008, p. 24
3.2	Mentoring could make me feel needed	Mentoring could make me feel valuable to others.	“You feel valuable to other people, and it feels... like a valuable use of my time... [...]”	Limeri et al., 2019, p. 5
3.3	Mentoring could make me feel better about myself	Mentoring could make me feel good (i.e., fulfilled, satisfied, rewarded or enjoyed).	“That satisfaction is really why I would mentor.”	Limeri et al., 2019, p. 6
			[I] “Thought it would be fun”.	Monk et al., 2014, p. 392
3.4	Mentoring could make me feel important		“I would be honoured to have the chance to build a relationship with a young person at a formative time in their life.”	Fassetta et al., 2014, p. 13
3.5	Mentoring is a way to make new friends		“Volunteering is an opportunity to develop relationships with others”.	Wasburn-Moses et al., 2014, p. 79
<b>Theme 3b – Self-help (Protective):</b> Distraction from/alleviation of personal problems or negative feelings (e.g. anxiety, loneliness, sense of uselessness, self-doubt or guilt).				
3.6	No matter how bad I might be feeling, mentoring could help me forget about it			
3.7	By mentoring I could feel less lonely			
3.8	Mentoring could relieve me of some of the guilt over being more fortunate than others			
3.9	Mentoring could help me work through my own personal problems			
3.10	Mentoring could be a good escape from my own troubles	a) Mentoring could allow me to escape/forget about the troubles of my day-to-day life.		
		b) Mentoring could be a good escape/nice break from a routine, boring or burdening work life.	It “is a nice break from just slouching over my keyboard and staring at my screen for a long time and doing some of the other less fun parts of research.”	Limeri et al., 2019, p. 6
<b>Theme 4 – Career:</b> Exploration of career options and acquisition of career-related experiences, knowledge or skills that can pay off in terms of career or academic development.				
4.1	Mentoring could help me to get my foot in the door at a place where I would like to work			
4.2	I could make new contacts that might help my business or career			
4.3	Mentoring could help	Mentoring could help me to succeed in	“[...] I wanted to get something back for what I was putting into it... Frankly, I expected	Dolan &

	me to succeed in my chosen profession	my current or future career ... <b>a)</b> ... by increasing the productivity and/or quality of my work (or decreasing my workload).	to – you know, four hands are better than two.”	Johnson, 2009, p. 491
		Mentoring could help me to succeed in my current or future career ... <b>b)</b> ... by allowing me to reinforce foundational knowledge and basic skills.	“While the initial learning curve can be lengthy in the beginning, I have found working with students supports my work because they often bring a new perspective and fresh ideas that contributes substantially to my research.”	Baker et al., 2015, p. 403
		Mentoring could help me to succeed in my current or future career ... <b>c)</b> ... by allowing me to build technical/ practical and interpersonal skills.	“[...] It was a chance for me to reinforce my own methods and also teach her at the same time.”	Limeri et al., 2019, p. 6
		Mentoring could help me to succeed in my current or future career ... <b>d)</b> ... by benefitting other work relationships of mine (thanks to what I could learn by mentoring or the experience itself).	“I’d like to be a PI. I want to gain experience mentoring students as well because that’s a big part of being a PI.”	Limeri et al. 2019, p. 6
			“She [the faculty head] made it clear that it was important to do for various reasons... [...] So it would have—if I refused to do it for whatever reason or if one would refuse to do those things, I think that initially could hinder the relationship with Carol!”.	Dolan & Johnson, 2009, p. 491
4.4	Mentoring experience would have looked good on my CV	Mentoring experience would have looked good on my CV	“[...] I did have in the back of my mind that I needed to work a bit on my resume to make it a bit more full.”	Meltzer & Saunders, 2020, p. 4
4.5	Mentoring will allow me to explore different career options	Mentoring will give me the chance to develop and confirm my interest in pursuing a certain career path.	“I thought maybe this would be a good way to see if I would like to work with adolescents and see how I fit there”.	McGill, 2012, p. 61
			“[...] I’m thinking about working with young adults or children in the future, I thought it was a good opportunity to have my foot in and see how it’s going to work and if I’m going to enjoy this process.”	Meltzer & Saunders, 2020, p. 4
<b>Theme 5 – Social:</b> Reinforcement of bonds with important others (e.g., relatives, friends or colleagues) who volunteer and engagement in activities viewed favourably by a person’s social reference groups (in the sense of compliance to social norms).				
5.1	My friends or relatives were serving as mentors	My friends, relatives or peers were serving as mentors.	“[...] all other grad students were mentoring undergraduate students [...]”	Limeri et al., 2019, p. 7
5.2	People I’m close to wanted me to serve as a mentor			
5.3	People I know shared an interest in volunteering			
5.4	Others with whom I am close placed a high value on volunteering			
5.5	Mentoring was an important activity to the	<b>a)</b> Mentoring was an important activity to the people I know best	“My husband was the careers advisor at [our local high school [...] in a way he was a mentor as well... [...] It’s just very much a normal part of our existence.”	Meltzer & Saunders,

	people I know best			2020, pp. 3-4
		<b>b)</b> I could fulfil part of the duties of the position I hold and meet <i>implicit</i> expectations related to it.	“I guess it's assumed. It's not written in the job description. It's just something you do... [..].”	Dolan & Johnson, 2009, p. 491
5.6	-	I hoped that what I could learn by mentoring or the experience itself could benefit other personal relationships of mine.		

**Table A.2 – Additional Motivations**

Sub-themes (provisional)	Sub-themes (final)	Illustrative quotations (if available)	Source
<b>Theme 6a – Civic responsibility (Community concern):</b> Sense of obligation to the community, in the form of a desire to give back or contribute to the improvement of overall social justice.			
6.1	I wanted to give back to and get involved in the community	<b>a)</b> I wanted to give back/contribute to and benefit the community.	“Just giving back to the community, that’s what it is, that’s my little help.” Tracey et al., 2014, p. 56
		<b>b)</b> I wanted to develop a greater sense of civic responsibility and a more positive attitude toward community service.	“We live and we work in these communities where these kids live. We have a responsibility to do as much as we can to help them and make these communities thrive [..].” EY, 2015, p. 12
		<b>c)</b> I hoped that this experience could make me feel better prepared to effectively take on influential community roles and help others in the future.	NA -
<b>Theme 6b – Civic responsibility (Social Justice):</b> see above			
6.2	Volunteering allows me to even out unequal social conditions.	Volunteering allows me to even out unequal social conditions.	“I simply want to play a part in contributing to a better society and supporting young people who have not had the same opportunities as others.” Fassetta et al., 2014, pp. 11-12 “I am committed to finding ways to help to transform the lives of young people who have had to face social and economic disadvantage [..].”
<b>Theme 7 – Organisational (Structure or reputation):</b> Desire to feel you belong to an organisation deemed an attractive place to volunteer because well-run and well-known in the community.			

7.1	I wanted to volunteer within a well-established and renowned organisation	I wanted to volunteer within a well-established/well-run and renowned organisation		
<b>Theme 8 – Attachment (group, organisational, academic and community):</b> Desire to feel you belong to a group, an organisation/programme (due to identification with its values/mission), to school or to the local community.				
8.1	I shared the core values and mission of the organisation	I wanted to belong to/be part of an organisation/programme of which I shared core values and mission.	“It’s that piece around the desire of individuals to work for an organization that is socially responsible and civically engaged ... this resonates with our employees and they want to be a part of it.”	EY, 2015, p. 10
8.2	-	I wanted to belong/feel connected to my prospective mentoring group.		
8.3	-	I wanted to feel more connected to my or my mentee’s school.		
8.4	-	I wanted to feel more connected to the community.		
<b>Theme 9 – Self-concept:</b> The development or affirmation of one own’s identity through volunteering.				
9.1	I always wanted to volunteer or missed volunteering			
9.2	-	Mentoring could help me develop a better sense of who I want to be in the future.		
<b>Theme 10a – Sensitising experiences (While ‘growing up’, as a child or an early-career professional):</b> Having went through experiences (either while growing up or later on) that make an individual more sensitive and sympathetic toward the social issue tackled through a specific type of volunteering				
10.1	I have experienced family breakdown when I was a child <sup>26</sup> so I appreciated the importance of having an adult mentor			
10.2	I benefited from a mentoring relationship when I was a child and wanted to give something back	a) I benefited from a mentoring relationship in the past and it’s my duty to pay it forward.	“[...] I’ve been fortunate to have good mentors in my life [...] ... I take very seriously my responsibility to offer similar support to other people, regardless of age”.	Reddick et al., 2011, p. 64
		b) I didn’t receive appropriate mentoring in the past and I want to ensure that others have more positive experiences.	“There were things that bothered me about the mentorship I received [...] that I didn’t want to have reflected in other students. It was my opportunity to be like, ‘Okay, this is how I think it should be done’.” “I did not have a mentor when I was an undergraduate ... it was not always easy to feel included. [...] I always remembered what I had lacked in terms of support and encouragement.”	Limeri et al., 2019, p. 7 Reddick et al., 2011, p. 64
10.3	I have been a younger carer and wanted to support a young person who is facing this situation			
10.4	-	I am a first-generation graduate/ ethnic minority student	I struggled “to figure out my place among so many others who	Reddick et

<sup>26</sup> Such as divorce/separation of parents, being looked after by local authorities.

		and I want to support YP from a similar background, who may struggle to access post-secondary education.	seemed to be privy to the unspoken rules of the academy long before stepping foot on campus.”	al., 2011, p. 61
10.5	-	I have experienced disadvantage when I was a child and I want to support YP from a similar background.		
<b>Theme 10b – Sensitising experiences (In later stages of life):</b> see above				
10.6	I have been a foster or kinship carer, so I knew how important it is for a young person to have an adult mentor			
10.7	I had no children of my own and wanted to offer my love and support to a young person in need	I had no children of my own and I enjoyed the company of youngsters.		
10.8	My children were grown up and I enjoyed the company of youngsters			
10.9	I was/was going to be employed in a helping profession <sup>27</sup> , so I knew how important it is for a young person to have an adult mentor	I was/was going to be employed in a helping profession, so I could use my expertise to change a young person’s life.	NA	-
10.10	-	I had an experience somewhat akin to youth mentoring (e.g., with nieces/nephews, friends’ children, younger colleagues; as a coach or club leader; etc.), so I already had an idea of what it would be like.	<p>“Amongst my family and friends, I tend to be the mother hen... I was always helping out my younger family friends and occasionally older ones, giving them advice and listening to them. I really enjoyed it, which is one of the reasons I... decided to go into mentoring.”</p> <p>“When I was a customer services manager at [supermarket], I had a huge team and a lot of them were young. I found myself being an older adult, being involved with people’s lives more from just a straight out work perspective.”</p> <p>“[...] At least with my role with the church, I already kind of had an idea of what the mentees would be like.”</p>	Meltzer & Saunders, 2020, pp. 3-4
<b>Theme 10c – Sensitising experiences (General):</b> see above				
10.11	I knew someone (e.g., child, friend or relative) who benefitted from a mentoring relationship			
<b>Theme 11 – Service requirement:</b> Being externally motivated by extrinsic pressures coming from an institution the individual belongs to				
11.1	The institution I worked for or studied at strongly encouraged my involvement as a mentor in the programme	I could fulfil part of the duties of the position I hold and meet <i>explicit</i> expectations related to it.	NA	-

<sup>27</sup> Such as teacher, counsellor or therapist, psychologist, social worker.



**Table A.3 – Volunteer Functions Inventory Outcomes**

Sub-themes (provisional)		Sub-themes (final or level II)	Illustrative quotations (if available)	Source
<b>Theme 1 – Values:</b> Expression of important prosocial and humanitarian values, such as altruism or compassion				
1.1	I have been able to help someone less fortunate than myself	I have been able to help someone less fortunate than myself/in need		
1.2	I had the opportunity to help people in need			
1.3	I have helped others	a) I've done something to help the younger generation.	"I just got a lot of personal satisfaction knowing that I've done something to help."	Tracey et al., 2014, p. 57
		b) I've made a difference/impact in a young person's life.	"[I appreciated] the opportunity to interact with, perhaps help, the younger generation." "The main way I benefited from my mentoring experience is the sense of fulfillment that has resulted from it, because I actually feel as though I have had a positive impact on D.'s life. [...]"	Caldarella et al., 2009, p. 11 Hughes & Dykstra, 2008, p. 28
1.4	(Young) people I am genuinely concerned about have been helped through my volunteer work at this organisation			
1.5	Through volunteering here, I have done something for a cause that I believe in	a) I've helped a young person into growing or learning something (e.g., a subject, a skill).	NA	-
		b) I've helped a young person create and progress toward a better future.	"I like helping kids for their future."	Coyne-Foresi et al., 2019, p. 541
		c) I've helped a young person feel more connected to school or motivated academically.		
		d) I've helped a young person work through some issues.	"[...] I know what you're going through. If you're stressed out, I've been stressed out. We can work through this together."	Limeri et al., 2019, p. 7
		e) I've helped a young person to have fun and feel socially included.		
<b>Theme 2 – Understanding:</b> Gaining new perspectives on things or a better understanding of the world, oneself and others through the learning experiences supplied by volunteering				
2.1	I have been able to learn more about the cause for which I am working by volunteering with this organisation.	a) I have been able to learn more about the cause for which I am working.		
		b) I have been able to learn more about positive youth development	"I learned that trust and loyalty are very important in dealing with children; if you let them down, it's hard to build that trust back up again."	Schmidt et al., 2004, p. 212

		or the target group I've worked with.		
		c) I have learned more about a number of social issues facing my community and heightened my political/cultural awareness.	"I've learned more about how poverty-stricken people are stigmatized in today's society...I now understand the domino effect of poverty, how hard it is to get out of poverty, and the extent to which it is detrimental to people's lives."	Hughes et al., 2009, p. 74
			"I learned that there are a lot of underprivileged/poor children in the area."	Schmidt et al., 2004, p. 212
2.2	Mentoring allowed me to gain a new perspective on things	Mentoring allowed me to gain a new perspective on things or overcome some preconceptions.	"[...] To see how someone else struggles and the hassles they face, it has changed the way I view everything, every client who comes to see me, I now have a different perspective, and I would never have had that experience."	Tracey et al., 2014, p. 57
			"[...] [They had] believed that adolescents were apathetic and not eager to learn.... I feel that I also had a similar thought going into the program.... I was also pleasantly surprised to see adolescent girls eager to learn and not at all apathetic...."	Slaughter-Defoe & English-Clarke, 2010, p. 90
			"Going into this class, I believed in the 'American Dream' and anyone can make something of their life. I was really forced to reevaluate my assumptions. These kids experience so much tragedy and carry so much emotional baggage [...]."	Hughes et al., 2009, p. 75
			"I think some of the mentors that do come into the program have ideas about Indigenous people that may not be correct ... They get the chance to engage with that young Indigenous person and find that the rumors aren't true [...]."	O'Shea et al., 2013, p. 402
			"It's strange but it made me think about the university in a different way. It might have slightly brightened my outlook and perhaps made me want to work a bit harder. I feel more ready to work hard and do well."	Raven, 2015, p. 287
2.3 & 2.4	Mentoring let me learn things through direct, hands on experience		"Interacting with students and fellow mentors. Learning how to communicate ideas to different people."	Monk et al., 2014, p. 393
			"[...] I feel like I'm more understanding, and I try to be more sensitive to what they're going through."	McGill et al 2015, pp. 552-553
			It "really taught me that when I need help, just to ask for it, because people will give it to me. [...]"	McGill, 2012, pp. 54-56
			"I've become more understanding and open minded to everyone else's different opinions and perspectives."	Coyne-Foresi et al., 2019, p. 540
"It has made me feel more open to talking about my problems to my parents and to my counselors."				
2.5	I have explored my own strengths.	I became more self-aware and learned about my own strengths	"So as a person, I also came to know more about my communication skills. How I communicate better, in what size of group and all that."	Dolan & Johnson, 2009, p. 492

		and weaknesses.	“[the challenges] make me self-reflect because I have a problem being vulnerable with people, and I evaluated my own ways of developing relationships.”	McGill et al., 2015, p. 551
			“I discovered a creative side of myself”.	McGill, 2012, pp. 57
			“I learned more about myself, which was surprising. I expected this experience to be of benefit to the kids but I found that there is so much more to learn about myself and my own culture.”	Schmidt et al., 2004, p. 212
				O’Shea et al., 2016, p. 73
<b>Theme 3a – Self-help (Enhancement):</b> Feeling of being useful/needed or good about oneself (increase in/maintenance of a sense of self-worth, self-esteem or positive emotions)				
3.1	My self-esteem is enhanced by performing volunteer work in this organisation.	My self-esteem, confidence and sense of self-efficacy are enhanced by mentoring.	“It really made me feel that yes, I can certainly do this [...] She gave me that level of comfort that I was doubting myself. Am I really ready to be a mentor? She showed me that, yes, I was ready to be a mentor.”	Limeri et al., 2019, p. 10
			“I think you find a sense of confidence in yourself in being able to teach these kids.”	Tracey et al., 2014, p. 56
			“It was a booster, a positive one—basically, I feel that ok, [Carol] believes or she has that trust in me that ok, I have that much knowledge and I can pass it to someone [...]”	Dolan & Johnson, 2009, pp. 492-493
			“I think the whole thing, from the organisation of it to the actual meetings, has definitely developed my confidence; that’s actually perhaps the biggest one: confidence for me.”	Raven, 2015, p. 285
3.2	Mentoring made me feel needed.	Mentoring made me feel valuable to others.	NA	-
3.3	From volunteering at this organisation, I feel better about myself.	Mentoring made me feel good (i.e., fulfilled, satisfied, rewarded or enjoyed).	“Just the personal pleasure of seeing somebody succeed is something that is always a lot of fun.”	Limeri et al., 2019, p. 9
			“It just feels good. I like to interact with people. And it's just fun to interact with students you know. [...]”	Dolan & Johnson, 2009, p. 493
			“I got great satisfaction mentoring students [...]”	Mee-Lee & Bush, 2003, p. 268
			“I found it very rewarding to watch my mentee grow as we progressed through the sessions together. I could really see her improvement in terms of behaviour and attainment.”	Raven, 2015, p. 284
			“It’s like a morale booster.”	Coyne-Foresi et al., 2019, p. 540
3.4	Mentoring made me feel important.		“Through the mentoring project, I experienced the benefit of having someone really looking up to me. I felt very rewarded to be able to affect the life of someone who is so	Hughes et al., 2010, p. 372

			impressionable.”	
			“There’s someone that really depends on you.”	Coyne-Foresi et al., 2019, p. 540
3.5	Mentoring allowed me to make new friends.		“One of the benefits is connecting with other people. Just walking to and from the school, and the connection you have with people that you don’t normally connect with.”	Tracey et al. 2014, p. 58
			“[...] We became friends because of this, and I definitely think we’ll stay friends. We just like really bonded and... it was just great.”	McGill et al., 2015, p. 551 McGill, 2012, p. 58
			“I’ve gained a lot of friends from it.”	Coyne-Foresi et al., 2019, p. 540
			“[...] sometimes you meet up with some of the mentors. You end up discussing what you were planning to do or what you’ve done and then you end up meeting for coffee and befriending them.”	Raven, 2015, p. 290
<b>Theme 3b – Self-help (Protective):</b> Distraction from/alleviation of personal problems or negative feelings (e.g. anxiety, loneliness, sense of uselessness, self-doubt or guilt)				
3.6	No matter how bad I might have been feeling, mentoring made me forget about it.			
3.7	By mentoring I felt less lonely.			
3.8	Mentoring relieved me of some of the guilt over being more fortunate than others.			
3.9	By volunteering at this organisation, I have been able to work through some of my own personal problems.			
3.10	Volunteering at this organisation allows me the opportunity to escape some of my own troubles.	a) Mentoring allows me to escape/forget about the troubles of my day-to-day life.	“Just to be able to...forget about yourself for one minute and actually completely focus on someone else. [...] I think it was just, it was able to kind of take me to a completely different area and just say, you know what, I don’t care.”	Tracey et al., 2014, p. 57
		b) Mentoring allows me to escape/take a break from a routine, boring or burdening work life.	NA	-
<b>Theme 4 – Career:</b> Exploration of career options and acquisition of career-related experiences, knowledge or skills that can pay off in terms of career or academic development				
4.1	Mentoring helped me to get my foot in the door at a place where I would like to work.			
4.2	In volunteering with this organisation, I made new contacts that might help my business or career.	By mentoring with this programme, I made new contacts that might help my business or career.	“It’s great networking, not only with future employers but also other professors. You can never have too many connections, the more you have, the more prepared you feel.”	Marshall et al., 2021, p. 98
4.3	Mentoring helped me to succeed in my chosen	Mentoring helped/will help me to succeed in my current or future	It “really helped me ease the workload. I think if anything, it’s lessened the workload or lessened the stress level.”	Limeri et al., 2019, p. 11

	profession.	career ... <b>a)</b> ... by increasing the productivity and/or quality of my work (or by decreasing my workload).	It "[...] opened up time for me to really explore other things [...]".  "I'd say my grades this year have massively beaten last year and [my] first year grades, so I would say [the benefits of mentoring have] definitely been evident in my work as well."	Dolan & Johnson, 2009, pp. 493  Raven, 2015, p. 286
		Mentoring helped/will help me to succeed in my current or future career ... <b>b)</b> ... by allowing me to reinforce of foundational knowledge and basic skills.	"Every time you explain it, you have a slightly different understanding of it, so to speak. It helps me learn my science better, when I'm explaining it to somebody else." "[...] I profited greatly in both my mentoring skills and my understanding of my research by explaining the details to someone else on a daily basis." "One of my modules is teaching and coaching, so there's a bit of an overlap there in terms of when you're talking about different learning styles. [Knowing] how children can be visual, auditory [or] kinaesthetic [learners] was quite useful."	Limeri et al., 2019, pp. 8-9 Reddick et al., 2011, p. 62 Raven, 2015, p. 287
		Mentoring helped/will help me to succeed in my current or future career ... <b>c)</b> ... by allowing me to build technical/ practical and interpersonal skills.	"I would say that the managerial skills that I learned because of that mentoring program was very beneficial. Even now, I'm doing it. The way I'm delegating jobs to my crew here in the [farming business], it's there. But it's a different field." "I guess one skill is being more comfortable with talking about things that maybe I'm not used to [...]. If I'm counseling someone, and someone tells me something shocking, I'll be able to respond [...]."	Dolan & Johnson, 2009, p. 492 McGill et al 2015, p. 553 McGill, 2012, p. 59
		Mentoring helped/will help me to succeed in my current or future career ... <b>d)</b> ... by benefitting other work relationships of mine (thanks to what learned by mentoring or the experience itself).	"It gave us something else to talk about. If I was bothered with something or the way something was going, I would definitely [...] go talk to her about it and she would make time to talk to me if [...]." "I was at a [work] training thing... a younger guy was struggling with some of the information... I could see that he was completely overwhelmed. [...] We talked about his struggle with where it was and how he was going. It was the same conversation I had with [my mentee]. It was normalising his emotional response to it and then trying to get him thinking outside the square of how to implement it... [...]."	Dolan & Johnson, 2009, p. 492 Meltzer & Saunders, 2020, pp. 5-6
4.4	Mentoring experience looked good on my CV	I had something looking good on my CV	"[...] when you teach someone or you can mentor someone, it shows that you are capable of that much amount of knowledge and experience of mentoring someone. So it's got to be on your CV." "I think saying you took a leadership position within your department, you got to know people, and you influenced what they thought in their early college experiences . . . being able to say that in a job interview is helpful."	Dolan & Johnson, 2009, p. 492 Marshall et al., 2021, p. 100
4.5	As a volunteer in this organisation, I have been able to explore possible career options.	Mentoring helped me develop or confirm my interest in pursuing a certain career path.	"[...] My experience in this program has shifted my perspective a bit [...]. I remain very focused on becoming a researcher in the education field in order to be an advocate for children, but now I have a clearer picture of who and what I am advocating for in my research...".	Slaughter-Defoe & English-Clarke, 2010, p. 87

			“It was helpful to decide my career path, what I want to do in general”.	Dolan & Johnson, 2009, p. 492
			“I guess I would have to say it just like reaffirms how I was already feeling with what I wanted to do in the future... [...].”	McGill, 2012, pp. 60-61
			[...] “I now have a taste of what it feels like to be a ‘real’ professor.”	Reddick et al., 2011, p. 63
			“I have learnt a lot about school and about learning. It makes me think I would possibly like to pursue a career in teaching’.”	Raven, 2015, p. 288
<b>Theme 5 – Social:</b> Reinforcement of bonds with important others (e.g., relatives, friends or colleagues) who volunteer and engagement in activities viewed favourably by a person’s social reference groups (in the sense of compliance to social norms).				
5.1	My friends found out that I am volunteering at this organisation.			
5.2	I’ve met the expectations of people I’m close to, who wanted me to serve as a mentor.			
5.3	I’ve met the expectations of people I know, who shared an interest in volunteering.			
5.4	I’ve met the expectations of others with whom I am close, who placed a high value on volunteering.			
5.5	People I know best knew that I am volunteering at this organisation.	a) People I know best knew that I am volunteering at this organisation.	“[...] I tell everyone I know, and I just feel so proud to actually be involved.”	Tracey et al., 2014, p. 58
		b) I’ve fulfilled part of the duties of the position I hold and met <i>implicit</i> expectations related to it.		
5.6	-	What I’ve learned by mentoring or the experience itself benefited other personal relationships of mine.	“Learning the tools to teach them how to read. I think that’s a plus to help—for me—it would be grandchildren, great-grandchildren.”	Tracey et al., 2014, p. 56
			“I think it’s certainly notched just my parenting abilities up a lot... what I’ve learned with [the mentoring program], we’re now implementing it with certainly my older daughter [...].”	Meltzer & Saunders, 2020, p. 5
			“[...] the mentoring program made me realize that I need to be there more for my little brother who is a junior in high school.”	Hughes et al., 2010, p. 373

**Table A.4 – Additional Outcomes**

Illustrative sub-themes (provisional)	Illustrative sub-themes (final)	Illustrative quotations (if available)	Source	
<b>Theme 6a – Civic responsibility (Community concern):</b> Sense of obligation to the community, in the form of a desire to give back or contribute to the improvement of overall social justice.				
6.1	I had the opportunity to give back to and get involved in the community.	a) I had the opportunity to give back/contribute to and benefit the community.	NA	-
		b) I developed a sense of civic responsibility and a more positive attitude toward community service.	“I learned a great deal about civic responsibility and the importance of helping all members of society. Though they may seem less fortunate, inevitably we are all interlinked as we do share the same society and we must work together to improve the position of all members of society.”	Hughes et al., 2009, p. 76
		c) I feel better prepared to effectively take on influential community roles and help others in the future.	“I do volunteer work with younger kids now because of it.”	Coyne-Foresi et al., 2019, p. 541
<b>Theme 6b – Civic responsibility (Social Justice):</b> see above				
6.2	Volunteering allowed me to even out unequal social conditions.	Volunteering allowed me to even out unequal social conditions.	“This semester...helped confirm my belief that I have an obligation to serve and strive to combat educational inequality. I see working to end this inequality as more than a civic duty...I am certain that I have a calling to use my privilege, my access to opportunity, and my set of skills in order to help better the lives of the less fortunate”.	Hughes et al., 2009, p. 76
<b>Theme 7 – Organisational (Structure or reputation):</b> Sense of belonging to an organisation deemed an attractive place to volunteer because well-run and well-known in the community				
7.1	I've volunteered within a well-established and renowned organisation	I've volunteered within a well-established/well-run and renowned organisation		
<b>Theme 8 – Attachment (group, organisational, academic and community):</b> Sense of belonging to a group, an organisation/programme (and of identification with its values/mission), to school or to the local community.				
8.1	I feel I belong to an organisation of which I share core values and mission	I feel I belong to an organisation/I am part of a programme of which I share core values and mission.	“The fact that I can participate in a program like this makes me think more highly of the company, that they're giving something back to the community [...], and it sort of makes it seem like a better place to be.”  “It makes me feel proud to work for a company that's willing to do that [...].”	Tracey et al., 2014, p. 58
8.2	-	I've developed a sense of belongingness and	“It's a family environment, even if you're not family like I find people	O'Shea et

		connectedness to my mentoring group.	are kind of just joining up, like kids that just know each other from different schools, they're all from different schools but they kind of come together and ... it's a whole family."	al., 2013, pp. 400-401
8.3	-	I feel more connected to my or my mentee's school.	"You appreciate high school more and all of its opportunities [...]"	Coyne-Foresi et al., 2019, p. 540
8.4	-	I felt more connected to the community.	"It gives me a sense of belonging."	Coyne-Foresi et al., 2019, p. 540
<b>Theme 9 – Self-concept:</b> The development or affirmation of one own's identity through volunteering.				
9.1	I had the opportunity to volunteer, something that I always wanted or missed			
9.2	-	I've developed a better sense of who I want to be in the future.	NA	-
<b>Theme 10a – Sensitising experiences (While 'growing up', as a child or an early-career professional):</b> Having went through experiences (either while growing up or later on) that make an individual more sensitive and sympathetic toward the social issue tackled through a specific type of volunteering.				
10.1	I have been able to support a young person who experienced family breakdown <sup>28</sup> like I did in the past.			
10.2	I have been able to fulfil the duty to pay forward the benefits I gained from a mentoring relationship I had in the past.	a) I have been able to fulfil the duty to pay forward the benefits I gained from a mentoring relationship I had in the past.	NA	-
		b) I have been able to avoid that other people do not receive appropriate mentoring, as happened to me in the past.		
10.3	I have been able to support a young person who is a younger carer, as me/as I was in the past.			
10.4	-	I have been able to support a young person who is a first-generation/ethnic minority student as me.	"Serving as a mentor to a first-generation college student and fellow Mexican-American through the IE program has been one of the most rewarding [...] experiences I've had. [...]"	Reddick et al., 2011, p. 63
10.5	-	I have been able to support a YP from a disadvantaged background, as I was in the past.		
<b>Theme 10b – Sensitising experiences (In later stages of life):</b> see above				
10.6	Not applicable			
10.7	I had the chance to offer my love and support to a young person in need, which is rewarding to me given that I didn't have any	I had the chance to enjoy the company of youngsters, which is rewarding to me given that I didn't have any children of my own.		

<sup>28</sup> Such as divorce/separation of parents, being looked after by local authorities.



	children of my own.		
10.8	I had the chance to enjoy the company of youngsters, at a point in time when my children were already grown up.		
10.9	I could use the expertise acquired in the field of my helping profession <sup>29</sup> to support a young person.		
10.10	-	I could exploit the experiences somewhat akin to youth mentoring I previously had (e.g., with nieces/nephews, friends' children, younger colleagues; as a coach or club leader; etc.), to support a young person.	
<b>Theme 10c – Sensitising experiences (General):</b> see above			
10.11	Not applicable		
<b>Theme 11 – Service requirement:</b> Being externally motivated by extrinsic pressures coming from an institution the individual belongs to			
11.1	I have met the requirements/expectations of the institution I work for or study at, which strongly encouraged my involvement as a mentor in the programme		

**Table A.5 – Negative outcomes and feelings ('Within-pair' & 'Extra-pair')**

Table 5 – Negative outcomes or feelings			
Sub-themes		Illustrative quotations (if available)	Source
<b>Theme 1a – Within-pair (Negative outcomes):</b> Negative outcomes stemming from within-pair dynamics.			
1.1	Undermined self-esteem, confidence and sense of self-efficacy	"It made me doubt my abilities. I think that was the worst part. I was like, 'Maybe I can't teach. Maybe I can't do science. Maybe I'm not good at mentoring'."	Limeri et al., 2019, p. 11
<b>Theme 1b – Within-pair (Negative feelings):</b> Negative feelings stemming from within-pair dynamics.			
2.1	Hesitation, insecurity, discomfort, fear, feeling threatened, apprehension/worry/concern	"I don't feel comfortable, like confident enough [...]." "I was slightly apprehensive whether or not I'll be able to communicate effectively."	Limeri et al., 2019, pp. 5-6
2.2	Vicarious stress, apprehension/worry/concern	"I've been really stressed out about my students. [They] were having personal problems that caused a lot of the stress. I was pretty concerned about their well-being [...]."	Limeri et al., 2019, p. 10
		"It kind of makes me a little anxious, a little bit at first, cause I don't want her not to go to school, to finish high school, and I want her to go to college."	McGill et al., 2015, p. 549 McGill, 2012, p. 68
2.3	Nervousness, anxiety, stress, feeling under pressure or strain	"So, I think that's kind of been an ongoing anxiety that started pretty early on, of "what is my role?" and "how much is driven by me, and how much is driven by them?" ... I have a lot of anxiety about it."	Limeri et al., 2019, p. 5

<sup>29</sup> Such as teacher, counsellor or therapist, psychologist, social worker.

		“I was just slightly anxious that I wouldn’t be able to be patient and explain things.”	Tracey et al., 2014, p. 57
2.4	Discouragement, demoralisation, disheartenment, sadness, frustration, emotional drain	“It was kind of disheartening. You spend a lot of time developing a relationship with this person and helping them grow, and then they just stop caring [...]”	Limeri et al., 2019, p. 11
		“[...] she did not want to write any of the responses on the page. [I] became very frustrated... Although my frustration was hidden, I wanted to get control of myself before it started to affect our time together. [...]”	Slaughter-Defoe & English-Clarke, 2010, pp. 86
		“[...] it’s frustrating that it is so time consuming.”	McGill, 2012, pp. 63
		“I was not frustrated with [my mentee] at all during our time together, but the more she told me, the more I grew frustrated with the difficult familial situation that she must deal with on a daily basis.”	Hughes et al., 2012, p. 775
2.5	Discomfort, disappointment, discontentment, anger, upset, irritation, feeling disrespected, taken advantage of	“I think I got the naughty child of the whole group, and he just didn’t want to do it...I was quite disappointed, because [...] to me, he has not improved at all.”	Tracey et al., 2014, p. 60
		“[...] I just didn’t feel like we got credit for all the work we’ve done for this, and when I came to her with that concern, she seemed to think that I was just lazy, which really irritated me.”	McGill et al., 2015, p. 549 McGill, 2012, p. 64
2.6	Feeling tested, torn, conflicted, confused, unprepared, lost, overwhelmed, shocked	I felt “just a little bit of being overwhelmed. Like, not necessarily panicked, but just being— ‘oh, my goodness this is outside of what I feel like I’m equipped to handle.”	McGill et al., 2015, p. 549 McGill, 2012, p. 68
		“I was appalled by the fact that [the teacher] could not answer any of the math questions. First, I was appalled that he was so negative and almost making fun of [my mentee] when she didn’t get the answer correct.”	Hughes et al., 2012, p. 775
		“Listening to [my mentee] speak so candidly about gangs was absolutely surreal [...]”	Hughes et al., 2012, p. 779
2.7	Shame, guilt	“I believe that we failed Barbara in a way because ... we did nothing to intervene. We should have [...] made her feel like she was in a more inclusive environment.”	Slaughter-Defoe & English-Clarke, 2010, pp. 85
<b>Theme 2a – Extra-pair (Negative outcomes):</b> Negative outcomes in other areas of mentor’s life (e.g., work, personal relationships).			
3.1	Decreased work productivity and delayed career advancement or progress in studies	“I do recognize mentorship has a lot of value way beyond that, but what I think about now is, ‘Well, what does my CV look like? How do I compare to these other 300 people applying to the same job?’”	Limeri et al., 2019, p. 9
3.2	Decreased academic engagement or connectedness to school (i.e., attachment/affection)	NA	-
		NA	-
3.3	At stake professional reputation	“[...] it would reflect poorly on me as the person who was supposed to have been training them.”	Limeri et al., 2019, p. 11
3.4	Deviant behaviours	NA	-

<b>Theme 2b – Extra-pair (Negative feelings):</b> Negative feelings stemming from how mentoring affects other areas of mentor’s life (e.g. work, personal relationships).			
4.1	Frustration	“So I’m trying to work on a lot of things, trying to wrap things up. It’s frustrating.”	Limeri et al., 2019, p.8
4.2	Worry/concern, stress and anxiety	“It stressed me out thinking that if [my PI] saw a product and read something and was like, “What? This kid is an idiot, this is terrible.””	Limeri et al., 2019, p. 11
4.3	Distrust	“That you're depending on them to water the plants on these x days and if they don't, there's no way for you to know that you didn't and that the gene expression may be different.”	Dolan & Johnson, p. 495
4.4	Shame, guilt	“I think I felt almost guilty, like I took my parents and my family for granted. I am so lucky to be able to have two parents who love me and a family where everyone gets along great.”	Hughes et al., 2012, p. 776

**Table A.6 – Factors (‘Barriers/Challenges’ in the first row; ‘Facilitators’ in the second row)**

	Sub-themes	Illustrative quotations or descriptions	Source
<b>Theme 1a – Programmatic (Commitment):</b> Elements related to how the programme is designed or implemented			
1.1	Time commitment required to <u>meet</u> (either for the mentor or for the mentee)	[...] “it’s frustrating that it is so time consuming.”	McGill et al., 2015, p. 547
		-	McGill, 2012, p. 63
1.2	Time commitment required to participate in <u>other programme-relevant activities</u>	“There is just a lot more work. Like course load work that also added on to hanging out with her. And I wanted to spend time with her and do all of that, but then I thought I had all this other class work to do that was like that is a lot for me to get done on my own. I was taking a full course load, as well. So, it just put a lot more pressure on me. Like I have to get this work done so I’ll have to push off my hanging out with her till I get this done. Which is kind of...”	McGill et al., 2015, pp. 547-548
		-	McGill, 2012, p. 63
1.3	Having to meet the mentee during the school hours	-	
1.4	Commitment required over a prolonged period (at least one academic year)	NA	
1.5	Distance to travel to meet mentee	NA	
1.6	Being acknowledged for the time and efforts devoted to the programme	“It’s really valuable for the institution that we do this. It would be nice if it was recognized.”	Baker et al., 2015, pp. 404-405
		NA	
<b>Theme 1b – Programmatic (Support):</b> see above			
1.7	Raising awareness about mentoring and its outcomes	-	
		NA	
1.8	Adequate role awareness and clarity...or lack thereof	“So you don’t want to take the place of the teacher and say something wrong or go to some extent you are not supposed to.”	Marshall et al., 2021, p. 101
		NA	
1.9	Initial guidance and training	“I am not prepared nor am I equipped with skills of mentoring. I don’t know whether I am doing things right. The University should have seminars and training sessions for those faculty members who have to mentor students.”	Mee-Lee & Bush, 2003, p. 268
		“At the beginning prior to the training, I thought I felt like I would be fine to sit and have that time with my mentee, but once we started the training... I realised there was a lot for me to learn and it was invaluable and it was a chance	Meltzer & Saunders,

		to refine my skills, think again about communication styles and listening and being present and it prepared me for the discussions that would evolve and/or the next few months ahead with my mentee. So I felt prepared... having completed the training.”	2020	
1.10	Additional Training	- NA		
1.11	Ongoing support and communication	Supervision and staff support	- “I think when I talked to [graduate facilitator] to see the mid-semester thing, she kind of like brought up something I was doing that I didn’t realize I was doing, and it kind of like showed I guess my insecurities with...the speaking in class, or giving advice- just not being very confident in my responses. And she was just kind of like, not necessarily call me out, but she brought it to light, and I didn’t realize that I was doing that, and it was just because I didn’t really know what to say, or what I wanted to say.”  “[Graduate facilitator] was like ‘You know what you’re saying, and you know what you’re talking about, so just be more confident about it.’ And I [thought], no one’s really said that to me before, I guess. And like I know those things, but I guess it’s always better and more... motivating when other people say that they’ve noticed that you’ve been doing those things.”	McGill et al., 2015, pp. 549-550  McGill, 2012, pp. 35-70-71-72
		Structured schedule of activities (both mentoring activities and other Program-relevant activities)	NA “We actually, by design, do not develop our own program content and that is why we actually try to find partners who have a long, established, sustained curriculum. We look for partners with stability, because we know we don’t have that internal [curriculum development] expertise, nor do we have that time.”	Herrera et al., 2008, pp. iii-19  EY, 2015, pp. 21-28
		Implementation fidelity checks	- NA	
		Weekly journals and final papers	- NA	
1.12	Match-making process	- NA		
1.13	Tailored and flexible approach	- -		
<b>Theme 2 – Relational: Elements related to within-pair dynamics</b>				
2.1	Scheduling conflicts in arranging meetings	“I was pushing to hang out and she was busy doing band and cross-country and our schedules conflicted a lot. I don’t have an always free schedule, and it’s just complicated sometimes.”	McGill et al., 2015, p. 548	

			McGill, 2012, pp. 64-65
		-	
2.2	Extent, regularity or frequency of communication/contact	“This class needs to be two semesters rather than one. Relationship building is important, but it takes time for them to form.” NA	Hughes et al., 2010, p. 374
2.3	Depth and quality of the connection/ communication established with mentee	“I think if we could spend more time together, and get to know each other a little bit more. Then [the relationship] would be ideal.”	McGill et al., 2015, pp. 548-550 McGill, 2012, pp. 65-66
		“[...] making a connection with another human being and really getting to know them [...]” can be the precondition to being able to relate to mentee’s difficulties, helping the mentee working through these issues.	Limeri et al., 2019, p. 7
2.4	Differences with mentee (e.g., cultural background, language, age, personality or interests)	“I’m from [a] foreign country, so I’m not sure if I can communicate good enough with them.”	Limeri et al., 2019, pp. 5-6-12
		“[...] The experiences and the things that [my mentee] wanted to speak about was very different to what I had heard [before]... [...] It made me realise that for people who will seek my advice in the future, everyone brings with them a different cultural backpack as they say. At the same time, I was likely more prepared [by] the fact that I do know everyone brings with them vastly different experiences, that I will ever expect or know about. It does make me more prepared in that case	Meltzer & Saunders, 2020, p. 5
2.5	Open conflicts or misunderstandings (e.g., unintentionally mistreating the mentee)	“It all culminated with her yelling at me [...]. It was really bad.... It was a bit stressful.” “I probably mistreated this student without realizing it... It resulted in me not mentoring an undergrad for one or two years after”	Limeri et al., 2019, pp. 10-11
		-	
2.6	Match closes (prematurely) or is not carried over	“It was kind of disheartening. You spend a lot of time developing a relationship with this person and helping them grow, and then they just stop caring [...].” -	Limeri et al., 2019, p. 11
2.7	(Prior) negative/positive experiences or not seeing/seeing the change	“My experiences with these students in a lot of ways frustrated me because they made me think, ‘If I’ve had two undergrads and they’ve both gone super poorly, is that on me?’”	Limeri et al., 2019, p. 10
		“One of the most rewarding parts is seeing them progress until trusting you more and coming to you more.”	Marshall et al., 2021, p. 98
2.8	Not having/having someone trained to help	“It would have been nice to have help with my project. It’s like sort of a fake incentive to graduate students to mentor undergrads, right? They want undergrads because they want help, but then you put a ton of work into it, and then you don’t get help.”	Limeri et al., 2019, p. 8

		“After a minimal investment, usually of time training, it really opened up my research to tackle slightly more risky or you know more interesting areas of research of various projects that I was working on... And having an undergraduate researcher that is competent, that I can trust to do those things, opened up time for me to really explore other things, which was the whole point, in my view, of graduate school.”		Dolan and Johnson, 2009, p. 493
2.9	Mentee’s involvement in decision-making	-		
		NA		
2.10	Reduced focus on instrumental activities	NA		
		NA		
		-		
2.11	Explaining, teaching, sharing	“For graduate students, there is no better way to really learn material than by having to teach the information yourself .... I profited greatly in both my mentoring skills and my understanding of my research by explaining the details to someone else on a daily basis.”		Reddick et al., 2011, p. 62
<b>Theme 3a – Individual (mentee):</b> Elements related to mentee’s characteristics or perceptions and expectations (about the relationship or himself/herself)				
3.1	Mentee’s unrealistic expectations	“[...] she can be kind of difficult, she can kind of make remarks, and I know she doesn’t mean anything mean, but just like you know, stuff like why aren’t you paying this for me, or why don’t we do this? And sometimes I’m like okay, well you know, I don’t really have a job, I’m a college student too.”		McGill, 2012, pp. 67-72
		-		
		-		
3.2	Mentee’s attributes or socio-demographic characteristics	Mentee is curious or chatty and open	“[The mentee] was initially somewhat reserved... However, as we progressed, and with some prompting, [the mentee] began to open up and appeared reasonably relaxed and confident to contribute to the discussion... I enjoyed the meeting.”	Fassetta et al., 2014, p. 15
		Mentee is likeable, fun, humorous, open, trustworthy and attractive	NA	
		Mentee is sympathetic and supportive	“She’s really sweet, she’s really encouraging, basically. Like I’ll tell her I have exams and she’ll be like ‘I’m sure you’ll get a 100 on it.’”	McGill, 2012, p. 57
		Mentee is open to seeking support	NA	
		Mentee is open to providing honest feedback	“There was that real good feedback from him. That helped me realize how to read people and manage an individual.”	Limeri et al., 2019, p. 8
		Mentee is middle-school aged and male	NA	
		Mentee is elementary-school aged	NA	
3.3	Mentee’s personal issues (attitudinal, behavioural, mental health, emotional regulation)	“I was not frustrated with [my mentee] at all during our time together, but the more she told me, the more I grew frustrated with the difficult familial situation that she must deal with on a daily basis. . . . She works long hours six days a week at Foot Locker in order to have any type of her own spending money because she explained that her mother’s income is not substantial enough in order to buy clothing for her.”		Hughes et al., 2012, p. 775
		“___ High School has opened my eyes to an environment I did not even know existed. A ___ [her mentee] often sleeps on the floor with little food in her stomach.”		Hughes et al., 2010, pp.

		“Without exposure to the issues we talked about in class and seeing them first-hand in the public school system, I do not think a person could fully understand the emergency of these issues in our society.”		370-371
<b>Theme 3b – Individual (mentor):</b> Elements related to mentor’s characteristics or perceptions and expectations (about the relationship or himself/herself)				
3.4	Extent to which initial expectations are met or re-adjusted	“I felt like it was draining me. It was also getting into and realizing he didn’t have the capacity to do the things that I really had wanted him to do. So, having to readjust my expectations, and just getting, flat out, frustrated at times [...]”.		Limeri et al., 2019, p. 10
		“It did feel like I was repeating the same explanations everyday... It seemed like it wasn’t working, at least in the beginning. But eventually what I did was I changed it and instead of treating him like a grad student, I decided ok, it would be like a recipe for what’s to be done. Every day, it will be on this desk. There will be things to do and things that I needed for him to accomplish the job and that worked.”		Dolan and Johnson, 2009, p. 495
3.5	Mentor’s attributes or socio-demographic characteristics	Candidate mentor or mentor is a (senior) student or senior faculty member	“The time thing [commitment] is probably the most frustrating [...] Especially as I’m getting closer to the end here, every hour counts. So I’m trying to work on a lot of things, trying to wrap things up.”	Limeri et al., 2019, p. 8
		-	-	
		Candidate mentor relies on public transportation or doubts the safety of community outings	NA	
		-	-	
		Mentor has a factory-based job	NA	
		-	-	
		Candidate mentor or mentor is under 40, young, a millennial or a recent graduate	“You know what? It’s really not a hard sell, because millennials look for organizations that are giving back. They want to work for organizations that give. We show, and demonstrate, that life-work balance. They really want that.”  “We find that in terms of employee engagement and retention, there is a reputational pull of doing this kind of [mentoring] work, especially for potential hires coming out of the universities where they have experienced mentoring relationships.” (Intel’s representative)	EY, 2015, p. 10-26
		Candidate mentor is male (and Anglo)	- NA	
		Candidate mentor is female	- NA	
(Former) mentor is approachable and helpful	- NA			
Candidate mentor is socially	-			



		interested	NA	
		Candidate mentor is willing to engage with someone who has issues (e.g., with disabilities)	- NA	
		Candidate mentor is actively engaged in professional development activities	- NA	
		Candidate mentor shows fewer depressive symptoms, higher GPA, empathy, (as well as autonomy and collective self-esteem)	- NA	
		Other personality traits or abilities	- NA	
		Mentor gives proof of resilience and perseverance	- NA	
3.6	Mentor is passionate about or experienced at something	- "I think what I set out to achieve was basically make reading enjoyable for another individual, because I love reading, and I'd like to share that experience with someone else. Because I think it is so important for a child to be able to read, and I've instilled that in my own children." "To me there is nothing greater than if you've got some quiet time, just to sit somewhere and disappear into a book, and I want to share that with other people."		Tracey et al., 2014, pp. 55-56
3.7	Mentor empathises (i.e., feeling more or less able to relate to mentee's experience/feelings)	NA "Learning how to relate to other people, and changing your approach... it's helped me think outside the box, and think of different ways... I have to adjust to her."		McGill, 2012, p. 54
3.8	Mentor lacks/does not lack self-efficacy (i.e., feeling more or less prepared or able to make a difference, help a mentee or handle some situations)	"I am not prepared nor am I equipped with skills of mentoring. I don't know whether I am doing things right." NA		Mee-Lee & Bush, 2003, p. 268
3.9	Mentor does not understand/understands what went wrong	NA -		
3.10	Benefits match mentor's initial motivations	- NA		
3.11	Mentor gains unanticipated benefits	- NA		
3.12	Cost-benefit imbalance (costs outweigh benefits or vice versa)	"So, I wouldn't take on an undergrad mentee that I wouldn't know in advance that I have at least a year that I can put		Limeri et al., 2019, pp. 6-8

		towards training that person to become productive in the lab and actually get the benefits out of their lab experience.”		
		“Even though the last one [was] a bad relationship experience, that didn’t really stop me [from mentoring again] because, again, I learned some stuff from there. I learned a lot of stuff from them as well, so that kind of motivated me to keep mentoring undergrads.”	Limeri et al., 2019, p. 9	
3.13	Mentor values the training	- NA		
3.14	Mentor invests a lot in the MR	- NA		
3.15	Mentor perceives potential alternatives as lower-quality	- NA		
3.16	Candidate mentor or mentor is satisfied with the MR or experience	- NA		
3.17	Mentor is committed to the MR	- NA		
3.18	Normative commitment	- NA		
<b>Theme 4 – Broader ‘social ecology’:</b> Elements related to other mentor’s relationships				
4.1	Support and encouragement provided by fellow mentors or mentee’s peers	Adult mentors act as role models to younger ones	- NA	
		Co-mentoring	“She’s [Carol] has been doing it a lot longer. I’ll do it one way and then she’ll meet with the student later and turn around and do it to a totally different way. And then I’m kind of like oh... [laughs] I always try to think what did I want, how do the students handle it, how are they going to go about it. Because I don’t want to be at odds or do it the wrong way I guess”. NA	Dolan and Johnson, 2009, pp. 495-496
		Structured group format facilitation or group development sessions	“I think it’s been different, just cause I feel like all of us are so different. And I really do like that a lot. I think it’s cool. But it’s kind of hard like connecting. Not like I was expecting us to be best friends. But I wouldn’t feel like I could call and be like let’s go do this with our [mentees]. And not like it’s anything they’ve done, I just think it’s a comfort - I just don’t feel fully comfortable in the group, and I think its cause we have a lot of really outgoing... personalities.”	McGill, 2012, pp. 58-86-87
			“There’s never been a group that we’ve been put together with randomly that I have felt so comfortable around, and it’s just been so great. We became friends because of this, and I definitely think we’ll stay friends. We just like really bonded and... it was just great.”	McGill et al., 2015, pp. 549-550 McGill, 2012, pp. 34-

			“It’s been really helpful just to have a great group of people that are so supportive, and I feel like we really have bonded, and they’ve been just a great support team.”	35-58-70-86-87
		Group setting for mentoring meetings	“Every day when I came in, it was a battle between them as to where I was going to sit, and who was going to hold my attention for the longest.”	Pryce et al., 2015, pp. 189-190
			“The largest obstacles that I had to overcome in order to get closer to [my protégé] were the other children. They were all very talkative, outgoing kids. They would all fight for my attention from the moment I walked in the door. It took a while for me to ask [my protégé] a question, and actually get an answer from her, and not all of the other children.”	
			It seemed to really make a difference in his communication to sit with his friends.”	Pryce et al., 2015, p. 189
4.2	Support and encouragement provided by family and friends	-		
		NA		
4.3	Support and encouragement provided by mentee’s parents or guardians	NA		
		NA		
4.4	Support and encouragement provided by the home institution	Participation is not/is part of a workplace-initiated activity or a service-learning course	NA	
			NA	
		Weak/strong commitment from organisational leaders	“Well, my boss wasn’t very happy if I had to leave from work...my teammates on the floor were quite happy to cover me for that hour I was gone...he [the boss] didn’t really like it. But usually I left from home, I changed my day, and I, like I’d do it either Tuesday or Wednesday, and so it didn’t impact on him at all.”	Tracey et al., 2014, p. 58-59-64
			“I think that encourages other people to volunteer when they see that executives in the company see this is valuable and are spending their personal time with it.” (IBM’s representative)	EY, 2015, pp. 18-24-25-26-27
		“Our employees are motivated by receiving a personal invitation. You think about how many emails somebody gets on a regular basis. But if it’s your leader that asks, they are more apt to pay attention!”		
Scheduling flexibility (e.g., flexible mentoring hour, paid time-off to volunteer) is not granted	-			
	NA			

		Institutional reward systems that under-value/value mentoring	<p>“I have so much to do here that I only do mentoring in my spare time because I see it as an added responsibility. Teaching is in my timetable and research is the first priority in my agenda. When it comes to substantiation and promotion, they [the university] only looks at your teaching evaluation scores and your publications. Who is going to look at whether you are a good mentor or not?”</p> <p>“The number one thing is consistency in terms of being there every week. ... Our CEO says there’s nothing, including your work, that stands in the way of going to your mentoring appointment every week.” (Coastway Community Bank’s representative)</p>	<p>Mee-Lee &amp; Bush, 2003, p. 268</p> <p>EY, 2015, pp. 22-25-28</p>
		Not providing/providing a variety of mentoring options	- NA	
		Dearth of opportunities for extracurricular interactions with undergraduates	NA NA	
		Not providing preliminary research skills training to undergraduate mentees (e.g., through boot camps or peer-mentoring experiences)	- NA	
4.5	Support and encouragement provided by teachers and school staff	<p>“My frustration with the teacher’s expectations of the students continued when she instructed the students to use the class period to paste articles onto pieces of construction paper. I believe that the time could have more effectively utilized for college preparation, especially with the ACT on the horizon.”</p> <p>“I was appalled by the fact that [the teacher] could not answer any of the math questions. First, I was appalled that he was so negative and almost making fun of [my mentee] when she didn’t get the answer correct.... Then, when [the teacher] tried to solve the next problem, and couldn’t, I was happy to help, but at the same time, I was shocked... He even told the class that if he had to take the ACT right now, he would fail.”</p> <p>NA</p>		<p>Hughes et al., 2012, P. 775</p>
<b>Theme 5 – Miscellaneous: Other elements</b>				
5.1	Meeting (spaces) at school	<p>“Every visit with the children was extremely loud! [...] It was very hard to focus on [my protégé] [...].”</p> <p>“Just walking into the school and seeing them all rushing back from lunchtime or whatever, brought back memories.”</p>		<p>Pryce et al., 2015, p. 190</p> <p>Raven, 2015, p. 285</p>
5.2	Spending money (or feeling pressured to do so)	<p>“I don’t want her to feel like she can’t depend on me, but I don’t want her to think that if I do pay it that she can just do it every time.”</p> <p>“She sees all the really cool stuff [others] get to do. A lot of them will go out to dinner and places, but I just am really broke, so we’ll go to campus and eat with my [campus card].”</p>		<p>McGill et al., 2015, pp. 548-549</p> <p>McGill, 2012, pp. 64-</p>

			67-68
		-	
5.3	Covid-19 pandemic	-	
		-	
5.4	Stigma...or lack thereof	-	
		-	

## Appendix B

### Map legend

**Table B.1 – Map legend**















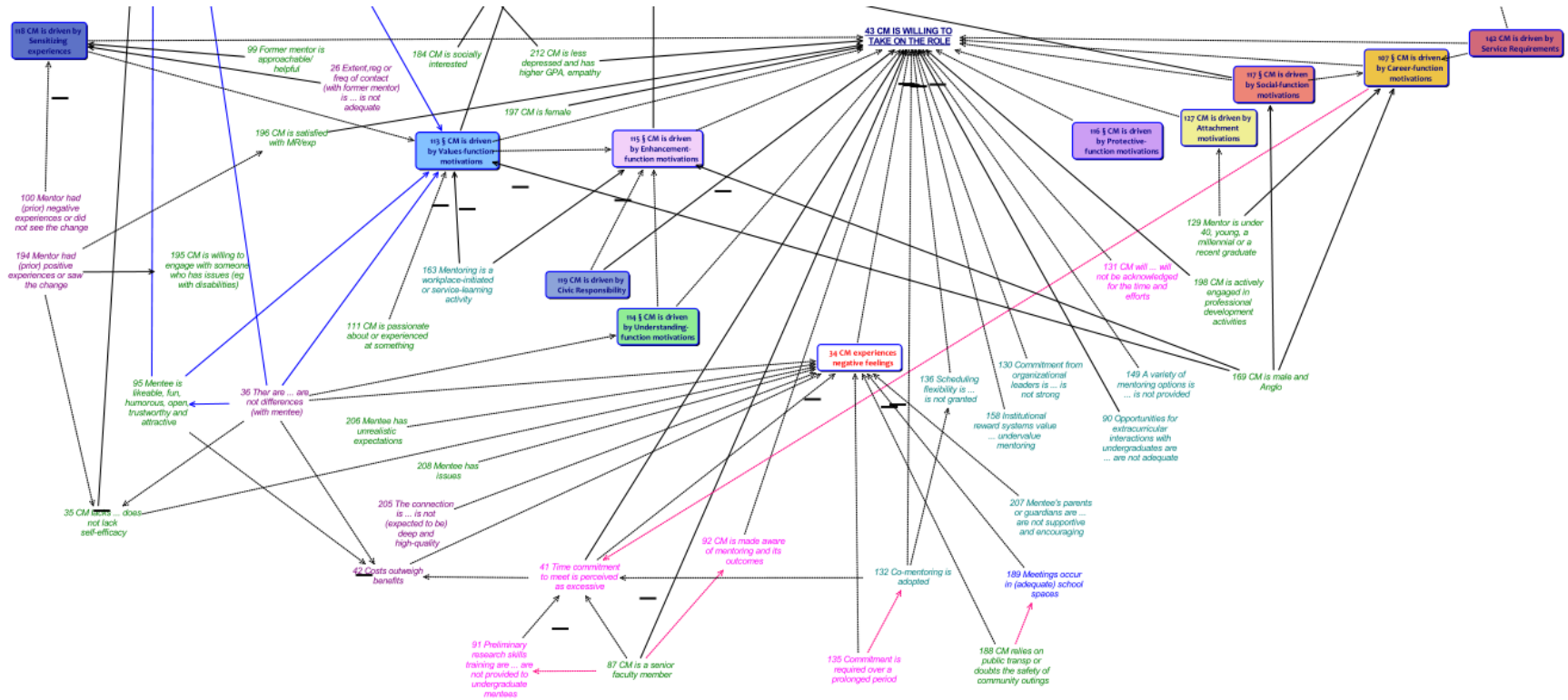
Color used		Category	
	Light blue	Values	VFI Motives & Positive Outcomes
	Light green	Understanding	
	Pink	Enhancement	
	Purple	Protective	
	Light orange	Career	
	Brick red	Social	
	Powder blue	Civic Concern	Additional Motives & Positive Outcomes
	Dark blue	Sensitizing experiences	
	Yellow	Attachment	
	Pale yellow	Organizational	
	Turquoise	Self-concept	
	Dark red	Service requirements	
	Blue	Within-pair	Negative Outcomes & Feelings
	Fuchsia	Extra-pair	
<i>Abc</i>	Fuchsia	Programmatic	Barriers & Facilitators
<i>Abc</i>	Dark purple	Relational	
<i>Abc</i>	Dark green	Individual	
<i>Abc</i>	Turquoise	Broader social ecology	
<i>Abc</i>	Electric blue	Others	

Figure B.1 – Decision to take on the role (extended conceptual framework)<sup>30</sup>

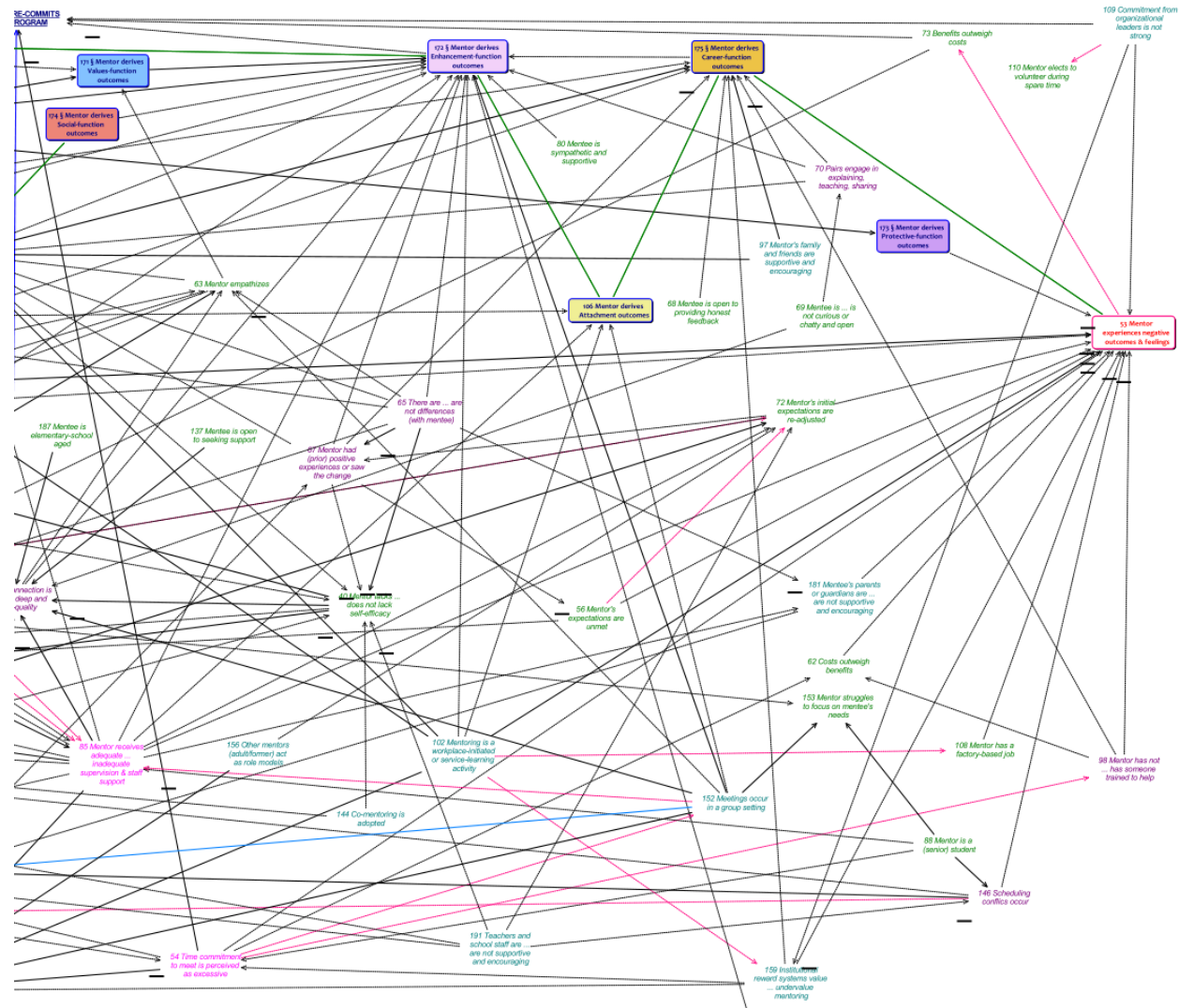


<sup>30</sup> CM = Candidate Mentor





**Figure B.3 – Decision to re-commit (right quadrant – extended conceptual framework)**



## Appendix C

### Characteristics of included studies

**Table C.1 – Categorization and identifying codes**

Youth	Mentors from	Study	ID	
<b>Identified as at-risk</b>	<b>High schools (peer mentoring, including cross-age)</b>	Karcher et al., 2005	A1	
		Herrera et al., 2008	B1	
		Cavell et al., 2018 <sup>32</sup>	C1	
		Karcher, 2009 <sup>1</sup>	D1	
		Karcher & Lindwall, 2003	E1	
		Carter et al., 2001	F1	
		Coyne-Foresi et al., 2019	G1	
	<b>Private sector</b>	Tracey et al., 2014	H1	
	<b>Community</b>	Caldarella et al., 2010	I1	
		Fassetta et al., 2014	J1	
		Caldarella et al., 2009	K1	
		Elli & Granvill, 1999	L1	
		Meltzer & Saunders, 2020	M1	
		Aresi et al., 2021	N1	
	<b>University/college</b>	<b>Only students</b>	Weiler et al., 2013	O1
			McGill et al., 2015	P1
			McGill, 2012	Q1
			Trepanler-Street, 2007	R1
			Banks, 2010	S1
			Hughes et al., 2009	T1
			Schmidt et al., 2004	U1
			Tierney & Branch, 1992	V1
			Pryce et al., 2015	W1
			Hughes et al., 2010 <sup>33</sup>	X1
			O’Shea et al., 2013	Y1
			Strapp et al., 2014	Z1
Wasburn-Moses et al., 2014			A2	

<sup>32</sup> Only a part of the mentees was at-risk.

<sup>33</sup> 33% of volunteers mentored after-school, in community centers. When possible, quotes from these mentors were not coded.

			Hughes & Dykstra, 2008	B2
			Hughes et al., 2012	C2
			Marshall et al., 2015	D2
			Lee et al., 2010	E2
			O'Shea et al., 2016	F2
<b>Not identified as at-risk</b>	<b>University/college</b>	<b>With faculty</b>	Monk et al., 2014	G2
		<b>Community</b>	Terry, 1999	H2
		<b>Only students</b>	Slaughter-Defoe & English-Clarke, 2010	I2
			McQuillin et al., 2015	J2
			Karcher et al., 2006 <sup>34</sup>	K2
			Foukal, Lawrence, & Williams, 2016	L2
			Foukal, Lawrence, & Jennings, 2016	M2
Raven, 2015	N2			

University/ college students	Mentors from		Study	ID
<b>Identified as at-risk</b>	<b>University/college</b>	<b>Peer mentoring</b>	Limeri et al., 2019	O2
			Siem & Stürmer, 2012	P2
			Reddick et al., 2011	Q2
			Amaral & Vala, 2009	R2
			Jackling & McDowall, 2008	S2
		<b>Faculty</b>	Morales et al., 2017	T2
<b>Not identified as at-risk</b>	<b>University/college</b>	<b>Peer mentoring</b>	Roszkowski & Badmus, 2014	U2
			Dolan & Johnson, 2009	V2
			Marshall et al., 2021	W2
			Allen et al., 1997	X2
		<b>Faculty</b>	Baker et al., 2015	Y2
			Behar-Horenstein et al., 2010	Z2
			Mee-Lee & Bush, 2003	A3
<b>SBM &amp; CBM jointly</b>	<b>Community or schools</b>	Gettings & Wilson, 2014	B3	
		Drew, 2018	C3	
		Herrera et al., 2000	D3	
	<b>Private sector</b>	Ernst & Young, 2015	E3	

<sup>34</sup> Only a part of the mentors were students.

**Table C.2 – Methodological approach**

Quantitative	50%
Qualitative	29%
Mixed	21%

**Table C.3 – Location of implementation**

Australia	9%
Canada	3%
Germany	2%
Hong Kong	2%
Italy	2%
United Kingdom	5%
United States	72%
Not specified	5%

**Table C.4 – Year of inception**

1985-1994	3%
1995-2004	12%
2005-2014	12%
Not specified	71%
Variable	2%

**Table C.5 – Program dominant goals**

Instrumental or goal-oriented	36%
Developmental or relationship-oriented	14%
Blended	21%
Variable	2%
Not specified	28%

**Table C.6 – Frequency of meetings**

Daily	2%
Weekly	43%
Weekly to Monthly <sup>35</sup>	21%
Monthly	3%
Not specified	31%

**Table C.7 – Minimum duration of meetings**

< 10 weeks	2%
10-15 weeks	7%
16-20 weeks	12%
1 semester	3%
3 months	2%
6 months	3%
8-9 months	40%
2 academic years	2%
Variable	2%
Not specified	28%

**Table C.8 – One-to-one mentoring**

Yes	33%
No	21%
Partially	22%
Variable	9%
Not specified	16%

**Table C.9 – On-site supervision**

Yes	38%
No	7%
Not specified	55%

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<sup>35</sup> Weekly to Bi-weekly; Bi-weekly; Weekly to Multi-weekly; Weekly to Monthly; Multi-weekly to Monthly.

**Table C.10 – Parents’/guardians’ involvement**

Yes	9%
Limited	5%
Very limited	3%
Not specified	83%

**Table C.11 – Service requirements**

Yes	38%
Partially	7%
Variable	3%
Not specified	28%
No	22%
Uncertain	2%

**Table C.12 – Mentors’ gender**

Mainly <sup>36</sup> Females	72%
Mainly <sup>37</sup> Males	9%
Balanced	10%
Not specified	9%

**Table C.13 – Mentors’ age**

Mainly under 40	67%
Mainly over 40	14%
Not specified	19%

**Table C.14 – Mentors’ profile**

Adult (mixed profiles)	16%
Corporate volunteers	3%
High school-aged	12%

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<sup>36</sup> Operationalized as 60% or more.

<sup>37</sup> As above.

University students	50%
University students + other profiles <sup>38</sup>	12%
Faculty members	7%

**Table C.15 – Mentees’ gender**

Mainly Females	21%
Mainly Males	7%
Balanced	9%
Not specified	64%

**Table C.16 – Mentees’ risk profile**

At-risk	62%
Not at-risk	29%
Partially	2%
Variable	7%

**Table C.17 – Mentees’ educational level**

Pre-school	2%
Elementary school	17%
Elementary and middle school	2%
Elementary, middle and high school	5%
Elementary and high school	2%
Middle school	19%
Middle and high school	7%
High school	21%
Undergraduate school	16%
Graduate school	2%
Undergraduate and graduate school	3%
Variable	2%
Not Specified	3%

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<sup>38</sup> Postdoctoral researchers; staff/faculty members; adults (mixed profiles).

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## Appendix D

### Motivations and Positive Outcomes

**Table D.1 – Overview: Incidence of each theme and sub-theme**

Themes	Sub-themes	% of sources discussing sub-theme		N. of times each theme is discussed		
		As a motivation	As an outcome	As a motivation	As an outcome	Total
<b>VALUES</b>	Values (whole scale)	2%	2%	25	12	<b>37</b>
	Compassion/ help less fortunate	4%	0%			
	Help others	5%	5%			
	Make a difference in a YP's <sup>39</sup> life	11%	5%			
	Help a YP learn something	9%	2%			
	Help a YP create a better future	5%	5%			
	Help a YP feel academically connected/motivated	5%	0%			
	Help a YP work through issues	2%	2%			
	Fun and social inclusion	2%	0%			
	<b>UNDERSTANDING</b>	Understanding (whole scale)	2%			
Do something for a cause		2%	0%			
Learn about PYD <sup>40</sup> or target group		2%	<b>18%</b>			

<sup>39</sup> YP =Young Person

	Learn about social issues	5%	14%			
	Gain new perspectives	5%	<b>29%</b>			
	Learn through experience	7%	<b>36%</b>			
	Become more self-aware	4%	<b>25%</b>			
<b>ENHANCEMENT</b>	Enhancement (whole scale)	4%	2%	18	61	<b>79</b>
	Enhance self-esteem	4%	<b>32%</b>			
	Feel valuable to others	4%	2%			
	Feel good	<b>14%</b>	<b>34%</b>			
	Feel important	2%	5%			
	Make new friends	5%	<b>29%</b>			
<b>PROTECTIVE</b>	Protective (whole scale)	2%	2%	2	3	<b>5</b>
	Escape from daily troubles	0%	2%			
	Escape from work life	2%	2%			
<b>CAREER</b>	Career (whole scale)	2%	2%	15	51	<b>66</b>
	Helpful contacts	0%	2%			
	Work <i>productivity</i> <sup>†41</sup> or quality	5%	11%			
	Reinforce foundational knowledge	5%	<b>21%</b>			
	Build skills	5%	<b>14%</b>			
	Improve work relationships	2%	7%			
	Strengthen CV	2%	5%			
	Career clarification	5%	<b>23%</b>			

<sup>40</sup> PYD = Positive Youth Development

<sup>41</sup> † = Applicable only to mentoring in HE

<b>SOCIAL</b>	Social (whole scale)	2%	2%	7	9	<b>16</b>
	Friends, relatives or peers mentoring/found out	4%	0%			
	People known best are mentoring/knew about mentoring	2%	2%			
	Implicit expectations	5%	0%			
	Benefit other personal relationships	0%	13%			
<b>CIVIC CONCERN</b>	Give back	<b>14%</b>	9%	12	21	<b>33</b>
	Civic responsibility	2%	<b>16%</b>			
	Future community roles	2%	9%			
	Social justice	4%	4%			
<b>ATTACHMENT</b>	Organization/program	5%	4%	3	14	<b>17</b>
	Mentoring group	0%	9%			
	School	0%	5%			
	Community	0%	5%			
<b>SELF-CONCEPT</b>	Future self	0%	2%	0	1	<b>1</b>
<b>SENSITISING EXPERIENCES</b>	Benefitted from mentor	7%	2%	12	2	<b>14</b>
	Lacked adequate mentor	4%	0%			
	First-generation graduate/ethnic minority student	4%	2%			
	Helping profession	2%	0%			
	Experience akin to youth mentoring	4%	0%			
<b>SERVICE REQUIREMENTS</b>	Explicit expectations	4%	0%	2	0	<b>2</b>

Note, in the following tables:

- Only studies that cite at least one sub-theme and only the themes covered are reported within tables.
- The symbols within cells indicate how the sub-theme was assessed: “X” if qualitatively; a grey cell with a dot if quantitatively; a grey cell with a “X” if both (e.g., mixed studies).
- For each item, the first row indicates if it is discussed as a motivation and the second on as an outcome.
- Blue is used to indicate the themes deemed primarily/uniquely salient in the field of mentoring in higher education (HE) institutions.

**Table D.2 – VFI Motives and Outcomes (Youth mentoring)**

SBM addressed to Youth:		Identified as at-risk																										Not identified as at-risk										
		High schools						Private sector	Community					University/college														Community	Univ./college									
Mentors from:														Only students														+ Faculty	Community	Only students								
Study:		A1	B1	C1	D1	F1	G1	H1	I1	J1	K1	L1	M1	O1	P1	Q1	R1	S1	T1	U1	V1	W1	X1	Y1	Z1	A2	B2	C2	E2	F2	G2	H2	I2	N2				
VALUES	Values (whole scale)																																					
	Compassion/ help less fortunate							X																														
	Help others							X			X																											X
	Make a difference in a YP's life							X		X	X																											
	Help a YP learn something							X			X																											
	Help a YP create a better future							X		X																												







**Table D.3 – VFI Motives and Outcomes (HE; SBM & CBM jointly)**

SBM addressed to:		University/college students identified as at-risk						University/college students not identified as at-risk				SBM & CBM jointly	
		University/college						Univ./college				Comm/schools	Private sector
Mentors from:		Peer mentoring				Faculty	Peer ment.		Faculty		B3		
		O2	P2	Q2	R2	S2	T2	V2	W2	Y2		A3	
Study:		O2	P2	Q2	R2	S2	T2	V2	W2	Y2	A3	B3	E3
VALUES	<b>Values (whole scale)</b>												
	Compassion/ help less fortunate												
	Help others	X				X							
	Make a difference in a YP's life	X										X	
	Help a YP learn something	X						X					
	Help a YP create a better future							X				X	
	Help a YP feel academically connected/ motivated			X				X		X			
	Help a YP work through issues	X											
	Fun and social inclusion												
UNDERSTANDING	<b>Understanding (whole scale)</b>												
	Do something for a cause												
	Learn about PYD or target group												
	Learn about social issues												
	Gain new perspectives	X		X				X					
	Learn through experience	X				X			X				
	Become more self-aware	X						X	X				
ENHANCEMENT	<b>Enhancement (whole scale)</b>												
	Enhance self-esteem	X				X		X					
	Feel valuable to others	X											
	Feel good	X						X					
	Feel important	X		X				X	X		X		



**Table D.4 – Additional Motives and Outcomes (Youth mentoring)**

SBM addressed to Youth:		Identified as at-risk																				Not identified as at-risk			
Mentors from:		High schools				Private sector	Community				University/college											University/college			
		Only students											+ Faculty	Only students											
Study:		B1	C1	D1	G1	H1	J1	K1	L1	M1	O1	P1	Q1	R1	T1	U1	V1	Y1	B2	E2	F2	G2	I2	N2	
CIVIC CONCERN	Give back					X	X	X															X		X
	Civic responsibility		X		X						X				X					X	X	X			
	Future community roles				X						X			X	X						X				
	Social justice						X								X							X			
ATTACHMENT	Organization/ program					X																			
	Mentoring group	X									X	X	X				X	X							
	School			X	X									X											
	Community				X									X											X



**Table D.5 – Additional Motives and Outcomes (HE; SBM & CBM jointly)**

SBM addressed to:		University/college students identified as at-risk		University/college students not identified as at-risk		SBM & CBM jointly	
		University/college		University/college		Community/schools	Private sector
Mentors from:		Peer mentoring		Peer mentoring	Faculty		
		O2	O2	V2	Y2	B3	E3
CIVIC CONCERN	Give back	X					X
	Civic responsibility		X				
	Future community roles		X				
	Social justice						X
ATTACHMENT	Organization/ program				X	X	X X
	Mentoring group						
	School						
	Community						
SC <sub>44</sub>	Future self						
SENSITISING EXP.	Benefitted from mentor	X	X				
	Lacked adequate mentor	X	X				
	First-generation graduate/ ethnic minority student		X				X
				X			
	Helping profession						
	Exp. akin to youth mentoring						
SR <sub>45</sub>	Explicit expectations			X			

<sup>44</sup> SC = Self-concept

<sup>45</sup> SR = Service Requirements







## Appendix F

### Factors (Barriers and Facilitator)

**Table F.1 – Overview: incidence of each theme and sub-theme**

			% of sources discussing sub-theme		N. of times each theme is discussed		
			As a barrier	As a facilit.	As a barrier	As a facilit.	Total
<b>PROGRAMMATIC</b>	<b>COMMITMENT</b>	Time commitment to meet	<b>23%</b>	0%	22	3	<b>25</b>
		Time commitment Program-relevant activities	2%	0%			
		Prolonged commitment (e.g., 1 academic year)	2%	0%			
		Distance to travel	2%	0%			
		Being acknowledged	5%	2%			
	<b>SUPPORT</b>	Awareness on mentoring & outcomes	0%	7%	9	41	<b>50</b>
		Role awareness & clarity	7%	2%			
		Initial guidance & training	4%	<b>14%</b>			
		Additional training	0%	7%			
		Supervision & staff support	0%	<b>23%</b>			
		Structured schedule of activities	4%	7%			
		Implementation fidelity checks	0%	2%			
		Weekly journals & final papers	0%	5%			
		Match-making process	4%	4%			
<b>RELATIONAL</b>	Scheduling conflicts	7%	0%	42	42	<b>84</b>	
	Extent, regularity or frequency of communication/contact	9%	7%				
	Depth and quality of the connection/ communication	9%	5%				
	Differences with mentee	<b>21%</b>	<b>14%</b>				

		Open conflicts or misunderstandings	2%	0%			
		Match closes (prematurely) or is not carried over	4%	0%			
		(Prior) experiences or not seeing/seeing the change	<b>11%</b>	<b>20%</b>			
		<i>Not having/having someone trained to help you</i> <sup>†47</sup>	4%	4%			
		Mentee involved in decision-making	0%	4%			
		Reduced focus on instrumental activities	2%	7%			
		Explaining, teaching, sharing	0%	<b>11%</b>			
<b>INDIVIDUAL</b>	<b>MENTEE</b>	Mentee's expectations	7%	0%	13	17	<b>30</b>
		Mentee's attributes or socio-demographics	0%	<b>16%</b>			
		Mentee's personal issues	<b>14%</b>	<b>13%</b>			
	<b>MENTOR</b>	Mentor's expectations (met, unmet, re-adjusted)	7%	5%	26	53	<b>79</b>
		Mentor's attributes or socio-demographics	<b>13%</b>	<b>25%</b>			
		Mentor is passionate about something	0%	7%			
		Mentor empathizes	4%	9%			
		Self-efficacy	<b>13%</b>	9%			
		Not understanding what went wrong	2%	0%			
		Match between benefits & motivations	0%	2%			
		Gaining unanticipated benefits	0%	2%			
		Cost-benefit imbalance	5%	7%			
		Mentor values the training	0%	2%			
		Investment size (high)	0%	4%			
		Alternatives (lower-quality)	0%	4%			

<sup>47</sup> † = Applicable only to mentoring in HE

		Satisfaction with MR or experience	0%	<b>11%</b>			
		Commitment to MR	0%	4%			
		Normative commitment	0%	5%			
<b>BROADER SOCIAL ECOLOGY</b>	<b>MENTORS</b>	Other mentors (adult/former) as role models	0%	4%	4	16	<b>20</b>
		Co-mentoring	2%	2%			
		Structured group format facilitation	2%	<b>13%</b>			
		Group setting for mentoring meetings	4%	9%			
	<b>F&amp;F</b>	Family and friends	0%	4%	0	3	<b>3</b>
	<b>P&amp;G</b>	Mentee's parents or guardian	4%	2%	2	1	<b>3</b>
	<b>HOME INSTITUTION</b>	Workplace-initiated activity or a service-learning	2%	5%	8	15	<b>28</b>
		Commitment from organizational leaders	4%	5%			
		Scheduling flexibility	0%	4%			
		Institutional reward systems	7%	9%			
		Variety of mentoring options	0%	2%			
		<i>Opportunities for extracurricular interactions</i> †	2%	2%			
<i>Preliminary research skills training</i> †	0%	2%					
<b>T</b>	Teachers and school staff	5%	2%	3	1	<b>4</b>	
<b>OTHERS</b>	Meeting (spaces) at school	5%	<b>11%</b>	5	6	<b>11</b>	
	Perceived financial responsibility	2%	0%				













**Table F.6 – Barriers and Facilitators (Programmatic & Relational – HE; SBM & CBM jointly)**

SBM addressed to:		University/college students identified as at-risk					University/college students not identified as at-risk							SBM & CBM jointly				
		University/college					University/college							Community or schools			Private sec.	
Mentors from:		Peer mentoring		Faculty			Peer mentoring		Faculty					Community or schools			Private sec.	
		O2	P2	Q2	S2	T2	U2	V2	W2	X2	Y2	Z2	A3	B3	C3	D3	E3	
Study:		O2	P2	Q2	S2	T2	U2	V2	W2	X2	Y2	Z2	A3	B3	C3	D3	E3	
PROGRAMMATIC	COMMITMENT	Time commitment to meet	X		X			X			X	X	X					
		Being acknowledged									X							X
	SUPPORT	Awareness on mentoring & outcomes					X	X										X
		Role awareness & clarity	X					X	X									
		Initial guidance & training							X				X					X
		Additional training																
		Supervision & staff support																X
		Structured schedule of activities															X	
		Match-making process																
RELATIONAL	Scheduling conflicts							X										
	Extent, regularity or frequency of comm./contact	X																
	Depth and quality of the connection/comm.	X					X											
		X																
	Differences with mentee	X	X		X						X	X						
		X			X				X									
	Open conflicts or misunderstandings	X																
	Match closes (prematurely) or is not carried over	X																
	(Prior) experiences or not seeing/ seeing the change	X					X		X									
		X						X	X		X							
	Not having/having someone trained to help you	X						X										
	X							X										
Mentee involved in decision-making																		
Reduced focus on instrumental activities																		
Explaining, teaching, sharing	X		X	X			X	X										

**Table F.7 – Barriers and Facilitators (Individual; Broader ‘social ecology’; Others – HE; SBM & CBM jointly)**

SBM addressed to:			University/college students identified as at-risk					University/college students not identified as at-risk							SBM & CBM jointly			
			University/college					University/college							Community or schools			Private sec.
Mentors from:			Peer mentoring		Faculty	Peer mentoring		Faculty					Community or schools			Private sec.		
			O2	P2	Q2	S2	T2	U2	V2	W2	X2	Y2	Z2	A3	B3	C3	D3	E3
INDIVIDUAL	MENTEE	Mentee’s expectations	X															
		Mentee’s attributes or socio-demographics	X						X									
		Mentee’s personal issues	X															
	MENTOR	Mentor’s expectations (met, unmet, re-adjusted)	X						X									
			X						X									
		Mentor’s attributes or socio-demographics	X														X	
			X							X								X
		Mentor is passionate about something	X									X						
		Mentor empathizes	X															
			X			X												
		Self-efficacy	X							X					X			
			X															
		Not understanding what went wrong	X															
		Cost-benefit imbalance	X					X										
			X							X					X	X		
		Investment size (high)																
		Alternatives (lower-quality)																
		Satisfaction with MR or experience																
		Commitment to MR																
		Normative commitment														X		
BROADER SOCIAL ECOLOGY	MENTORS	Co-mentoring							X									
		Group setting for mentoring meetings												X				
	HOME INSTITUTION	Commitment from organizational leaders							X			X					X	
		Scheduling flexibility															X	
		Institutional							X			X		X				

	reward systems					X						X					X
	Variety of mentoring options																X
	Opportunities for extracurricular interactions					X											
	Preliminary research skills training					X											
OTHERS	Meeting (spaces) at school															X	X

## Appendices Chapter 4

### Appendix A

#### Details on sample composition and participants' characteristics

**Table A.1 – Study sample composition**

	Sample		Population ( <i>Survey</i> <sup>48</sup> )
<b>Gender:</b>			
- Female	7	58%	63%
- Male	5	42%	36%
- NS	-	-	2%
<b>Age group:</b>			
- Under 35	2	17%	19%
- 35-40	1	8%	12%
- 41-55	4	33%	39%
- 56-64	3	25%	21%
- 65+	2	17%	9%
<b>Service length:</b>			
- <2 years	4	33%	(52%)
- >2 years	8	67%	(48%)
<b>Affiliation:</b>			
- Corporate	8	67%	≈60%
- Individual	4	33%	≈40%
<b>Mentee's status:</b>			
- Looked After (currently or previously)	6	50%	62%
- Non-Looked After	6	50%	38%
<b>Match length:</b>			
- <20 meetings	5	42%	(20%)
- >20 meetings	7	58%	(80%)
<b>School's location:</b>			
- Central	4	33%	23%
- Peripheral	8	67%	77%

<sup>48</sup> In absence of more precise information, the distributions observed in a recently conducted survey are provided, although these might not accurately represent the actual distributions within the overall population.

<b>School's delivery:</b>			
- Before 2018	7	58%	50%
- During 2018	5	42%	50%
<b>School's criticality:</b>			
- Low	3	25%	20%
- Medium	6	50%	53%
- High	3	25%	27%

**Table A.2 – Participants’ characteristics**

Pseudonym	Gender	Age group	Service length	Affiliation	Mentee's status	Match length	School (location)	School (delivery)	School (criticality)
Albert	Male	65+	>2 years	Individual	Non-Looked After	>20 meetings	Central	2017	Medium
Bernie	Male	35-40	<2 years	Corporate	Non-Looked After	>20 meetings	Central	2015	Medium
Celine	Female	Under 35	<2 years	Corporate	Non-Looked After	<20 meetings	Central	2018	Low
Diane	Female	56-64	<2 years	Individual	Looked After (Previously)	<20 meetings	Peripheral	2018	Low
Edwin	Male	41-55	>2 years	Corporate	Looked After	<20 meetings	Peripheral	2017	Medium
Eloise	Female	Under 35	>2 years	Corporate	Looked After	>20 meetings	Peripheral	2015	High
Giselle	Female	41-55	>2 years	Corporate	Looked After	>20 meetings	Central	2016	Medium
Neil	Male	56-64	>2 years	Individual	Looked After	>20 meetings	Peripheral	2018	Medium
Patrick	Male	41-55	>2 years	Corporate	Non-Looked After	<20 meetings	Peripheral	2015	High
Phoebe	Female	41-55	>2 years	Corporate	Non-Looked After	>20 meetings	Peripheral	2017	Low
Sally	Female	56-64	>2 years	Corporate	Non-Looked After	<20 meetings	Peripheral	2018	Medium
Vivian	Female	65+	<2 years	Individual	Looked After	>20 meetings	Peripheral	2018	High

## Appendix B

### Semi-structured Interview Guide

#### a. Opening questions

**Tell me a little bit about yourself**

*Objective: tracing interviewees' profile and understanding how they interpret their role as mentors*

1. How is your mentoring experience going?
2. Is this your first time/year as a mentor?
3. [If no] For how long have you been a mentor? Did you have many mentees since you started?
4. In general, do you consider yourself familiar/at ease with dealing and engaging with young people?
5. Did you feel the same way when you decided to become a mentor for the first time?
6. Do you have other recent experiences as a volunteer (in youth-related organizations or different fields)? (If yes) May I ask you what they consisted of and for how long you have been volunteering?
7. How do you describe to your friends/family what being a mentor is or what you do with your mentee?

#### b. Motivations and anticipated outcomes

**Why did you decide to become a mentor?**

*Objective: understanding the interviewees' motivational drivers for becoming a mentor*

8. In general, why do you think people decide to become mentors?
9. Does this apply to your decision to become a mentor too? Are there additional factors that motivated/attracted you at the very beginning?
  - i. (PROBE) Initially, what did you want to achieve by becoming a mentor? What did you expect to get out of it (for yourself too)?
  - ii. (PROBE) Did you expect it could be of any benefit for you (e.g., in terms of personal growth and wellbeing)? If yes, how?



### c. Gained outcomes

**What did you gain from being a mentor?**

*Objective: exploring the interviewees' perception on the outcomes gained and if their initial expectations have been met/satisfied*

10. What do you think mentors mainly gain from serving as mentors?
11. How is it to be a mentor and how does it make you feel? [Or: What do you think your life would have been like without being a mentor?]
12. You said that, by becoming a mentor, you mainly wanted to XXX [cite mentioned motivations]. Did you achieve those goals during your mentoring experience? How?
13. Do you think it benefitted you in any other/unanticipated way?
  - i. [If yes] In what ways did you unexpectedly benefit from being a mentor?
  - ii. (PROBE) Did this experience affected some areas of your personal life (e.g. work, relationships with significant others, etc.)? How?

### d. Mechanisms, facilitators, barriers & challenges

**What works (or not) for you?**

*Objective: investigating interviewees' perception about the factors that spur or hinder the achievement of positive outcomes and the interplay among them*

14. Can you describe me how the gains previously mentioned developed? (e.g., Did these positive changes occurred progressively/over time?)

MENTORING RELATIONSHIP:

15. As you may know, we invited mentors – if they wanted to – to bring something (e.g., an object, image, lyrics of a song, anecdote, etc.) that is representative of particularly memorable/ meaningful achievements and/or greatest difficulties experienced during their most recent mentoring relationship. Have you brought anything with you?
  - i. [If yes] Would you like to tell me why you chose it and what it represents to you?

16. May I ask you how do you feel about the relationship established with **your mentee**?

- i. Is there anything about him/her that improved the relationship or made it more difficult? What?
- ii. (PROBE) Are there differences between you and your mentee? If so, what are they? How have you navigated these differences? What has been the result?
- iii. (PROBE) How did this impact on you/your experience as mentor? Why?

17. Beyond the specific person you are mentoring, is there anything that helps make mentoring work better/improved your experience?

ORGANISATIONAL CONTEXT:

18. [If not already discussed] How do you feel about the relationship established with **the staff of MCR Pathways** and with **the Program Coordinator** operating in the school of your mentee?

- i. (PROBE) Are you satisfied with the support they provide? With anything in particular?
- ii. (PROBE) How did the relationship with them affect your mentoring relationship/ experience as a mentor? Why?
- iii. (PROBE) Is there anything you don't like or that you wish was different/would like to see changed in the future?

BROADER CONTEXT:

19. [If not already discussed] How do you feel about the relationship with the **parent(s)/guardian(s)** of your mentee?

- i. (PROBE) Are they supportive, encouraging, involved?
- ii. (PROBE) How did this affect your mentoring relationship/experience as mentor?

20. [If not already discussed] How do you feel about the relationship with the **teacher(s)** or the **school** of your mentee?

- i. (PROBE) Are they supportive, encouraging, involved?
  - ii. (PROBE) How did this affect your mentoring relationship/your experience as mentor?
21. [If not already discussed] How do you feel about the relationship with **other mentors**?
- i. (PROBE) Are they supportive, encouraging, involved?
  - ii. (PROBE) How did this affect your mentoring relationship/experience as mentor?
22. [If not already discussed] What do **your friends/family** think about the fact that you are a mentor?
- i. (PROBE) Are they supportive, encouraging, involved?
  - ii. (PROBE) How did this affect your mentoring relationship/experience as mentor?
23. [If not already discussed] Before you told me that you benefitted from being a mentor in a number of ways. Do the actors/factors just mentioned played a role in gaining these benefits? How?
24. Are there any other things that helped you achieve good results and improved your experience?

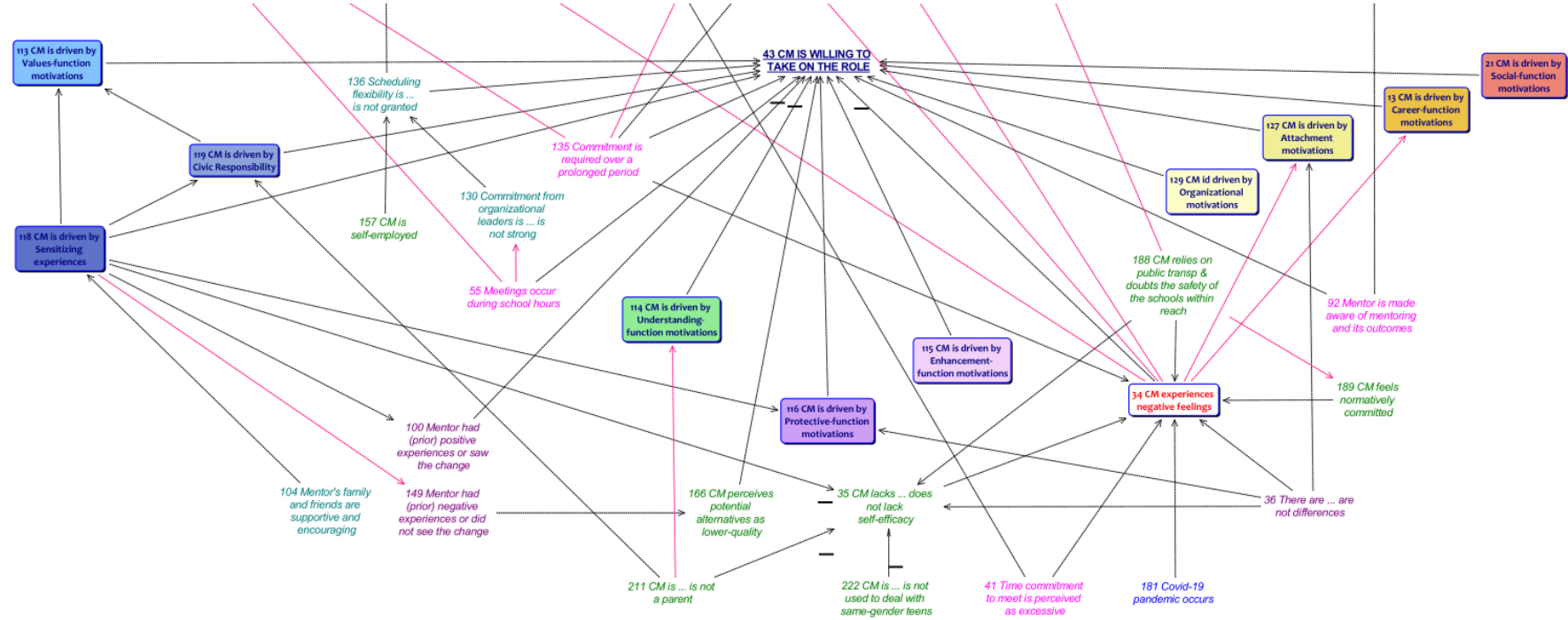
**BARRIERS AND CHALLENGES:**

25. Is there anything that, instead, made it more difficult or negatively affected your experience?
26. When you first decided to become a mentor, was there any particular concern or obstacle that made you hesitant about participating? What?
27. During your experience as a mentor, have you experienced challenges/difficulties. What?
28. What helped you cope with these difficulties?
29. Do you think there could be anything else that could help mitigate these difficulties? What?



Appendix C

Figure C.1 – Decision to take on the role (extended ToC)<sup>49</sup>



<sup>49</sup> CM = Candidate Mentor



Appendix D

Table D.1 – Barriers and Facilitators (Programmatic)

Themes & sub-themes		Study participants											% of mentors discussing sub-theme	N. of times each theme is discussed			
		<35	35-40		41-55			56-64			65+			As a barr.	As a facilit.	Tot	
		F	M	F	M	F	M	F	M	F	F	M					F
		Celine	Bernie	Eloise	Patrick	Giselle	Edwin	Phoebe	Neil	Diane	Sally	Albert	Vivian				
<b>COMMITMENT</b>	Time commitment to meet		X		X	X						X		33%	15	3	18
														0%			
	Time commitment Program-relevant activities		X		X	X	X							33%			
														0%			
	Meeting during school hours				X							X		17%			
														0%			
	Prolonged commitment (1 academic year)	X			X			X						25%			
					X									8%			
	Distance to travel					X						X		17%			
														0%			

	Being acknowledged													0%			
				X			X							17%			
SUPPORT	Awareness on mentoring & outcomes											X	X	0%	8	24	32
														17%			
	Role awareness & clarity				X	X							X	25%			
										X	X			17%			
	Initial guidance & training													0%			
						X								8%			
	Supervision & staff support	X				X							X	25%			
		X	X	X	X	X	X	X	X	X	X	X		92%			
	Structured schedule of activities												X	8%			
				X	X									17%			
	Weekly journals & final papers													0%			
													X	8%			
	Match-making process					X								8%			
		X					X						17%				
Tailored and flexible approach													0%				
							X	X				X	25%				



**Table D.2 – Barriers and Facilitators (Relational)**

Themes & sub-themes	Study participants											% of mentors discussing sub-theme	N. of times each theme is discussed			
	<35	35-40		41-55			56-64			65+			As a barr.	As a facilit.	Tot	
	F	M	F	M	F	M	F	M	F	F	M					F
	Celine	Bernie	Eloise	Patrick	Giselle	Edwin	Phoebe	Neil	Diane	Sally	Albert	Vivian				
Scheduling conflicts					X							X	17%	24	21	45
													0%			
Extent, regularity or freq. of communication/ contact		X	X	X				X				X	42%			
													0%			
Depth and quality of the connection/ communication									X				8%			
						X	X				X	X	33%			
Differences with mentee	X				X					X		X	33%			
	X			X					X		X		33%			
Match closes (prematurely) or is not carried over					X		X	X	X				33%			
													0%			
(Prior) experiences or not seeing/ seeing the change						X	X	X		X		X	42%			
	X		X	X		X	X		X	X	X	X	75%			

Mentee involved in decision-making													0%			
											X		8%			
Reduced focus on instrumental activities	X				X								17%			
		X			X								17%			
Explaining, teaching, sharing													0%			
										X			8%			
Provoking statements									X				8%			
													0%			

**Table D.3 – Barriers and Facilitators (Individual)**

Themes & sub-themes		Study participants											% of mentors discussing sub-theme	N. of times each theme is discussed				
		<35	35-40		41-55			56-64			65+			As a barr.	As a facilit.	Tot		
		F	M	F	M	F	M	F	M	F	F	M					F	
		Celine	Bernie	Eloise	Patrick	Giselle	Edwin	Phoebe	Neil	Diane	Sally	Albert	Vivian					
<b>MENTEE</b>	Mentee’s attributes or socio-demogr.			X	X					X				25%	7	5	12	
		X			X				X		X		X	42%				
	Mentee’s personal issues	X				X				X		X						33%
																		0%
<b>MENTOR</b>	Mentor's expectations (met, unmet, re-adjusted)				X		X	X						25%	16	21	37	
					X		X	X						25%				
	Mentor’s attributes or socio-demogr.			X							X							17%
						X	X	X	X				X					42%

Mentor empathizes					X								8%
													0%
Self-efficacy	X		X	X	X		X		X	X			<b>58%</b>
			X	X	X				X			X	<b>42%</b>
Not underst. what went wrong					X								8%
													0%
Cost-benefit imbalance													0%
								X	X				17%
Investment size (high)					X								8%
													0%
Alternatives (lower-quality)													0%
				X									8%
Normative commitment										X			8%
		X	X		X		X				X		<b>42%</b>

**Table D.4 – Barriers and Facilitators (Broader “social ecology” and others)**

Themes & sub-themes			Study participants										% of mentors discussing sub-theme	N. of times each theme is discussed				
			<35	35-40		41-55			56-64			65+		As a barr.	As a facilit.	Tot		
			F	M	F	M	F	M	F	M	F	F					M	F
			Celine	Bernie	Eloise	Patrick	Giselle	Edwin	Phoebe	Neil	Diane	Sally					Albert	Vivian
<b>BROADER SOCIAL ECOLOGY</b>	<b>MENTORS</b>	Other mentors (adult/former) as role models												0%	1	8	9	
			X		X			X						25%				
		Structured group format facilitation			X													8%
	<b>F&amp;F</b>	Family and friends				X	X		X		X				0%	0	5	5
				X			X			X		X		X	42%			
	<b>HOME IST.</b>	Workplace-initiated activity or a service-learning course													0%	2	8	10
							X							8%				
														0%				
					X			X			X				25%			
				X		X									17%			
	Scheduling flexibility	X			X		X			X				33%				

	T	Teachers and school staff											X		8%	1	3	4
					X			X	X									
OTHERS	Meeting (spaces) at school														0%	8	6	14
											X		X		17%			
	Perceived financial responsibility										X				8%			
															0%			
	Covid-19 pandemic		X		X				X	X	X		X	X	<b>58%</b>			
		X													8%			
	Stigma														0%			
				X							X	X			25%			

## Appendices Chapter 5

### Appendix A

#### Data conversion tables and supplementary data

**Table A.1 – Study sample composition (interviews)**

		Scotland		Italy	
<b>Gender</b>	Female	7	58%	7	87%
	Male	5	42%	1	13%
<b>Age</b>	Under 35	2	17%	-	-
	35-40	1	8%	-	-
	41-55	4	33%	1	13%
	56-64	3	25%	2	25%
	65+	2	17%	5	62%
<b>Service length</b>	<2 years	4	33%	4	50%
	>2 years	8	67%	4	50%
<b>Mentee's vulnerability</b>	Higher <sup>51</sup>	6	50%	4	50%
	Lower <sup>52</sup>	6	50%	4	50%
<b>Mentee's level of education</b> <sup>53</sup>	Elementary	-	-	4	50%
	Middle	-	-	4	50%
<b>Match length</b>	<20 meetings	5	42%	4	50%
	>20 meetings	7	58%	4	50%

<sup>51</sup> Looked After Children (previously or currently) for the Scottish sample.

<sup>52</sup> Non-Looked After Children for the Scottish sample.

<sup>53</sup> Elementary school or middle school.

<b>School's location</b>	Central	4	33%	-	-
	Peripheral	8	67%	-	-
<b>School's delivery</b>	Before 2018	7	58%	-	-
	During 2018	5	42%	-	-
<b>School's level of risk<sup>54</sup></b>	Low	3	25%	-	-
	Medium	6	50%	-	-
	High	3	25%	-	-
<b>City</b>	Milan	-	-	5	62%
	Rome	-	-	1	13%
	Naples	-	-	2	25%

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<sup>54</sup> The classification is based on historical data (2013/2014) on the proportion of pupils, within each school, living in the 20% most deprived data zones and looked after by local authorities.



**Table A.2 – Key characteristics of interviewees**

Country	Pseudonym	Gender	Age group	Service length (+/- 2 years)	Mentee's vulnerability	Match length (+/- 20 meetings)
Scotland	Albert	M	65+	+	L	+
	Bernie	M	35-40	-	L	+
	Celine	F	<35	-	L	-
	Diane	F	56-64	-	H	-
	Edwin	M	41-55	+	H	-
	Eloise	F	<35	+	H	+
	Giselle	F	41-55	+	H	+
	Neil	M	56-64	+	H	+
	Patrick	M	41-55	+	L	-
	Phoebe	F	41-55	+	L	+
	Sally	F	56-64	+	L	-

	Vivian	F	65+	-	H	+
Italy	Amanda	F	41-55	-	H	-
	Anne	F	56-64	+	L	+
	Cindy	F	56-64	+	H	+
	Jane	F	65+	+	H	+
	Lily	F	65+	-	L	-
	Pam	F	65+	-	L	-
	Sara	F	65+	+	H	+
	Rupert	M	65+	-	L	-



ENHANCEMENT	Enhance self-esteem																				0%	0%	1	19	20	5	11	16	
		X		X		X						X										33%							0%
	Feel valuable to others														X				X			0%							25%
																			X			25%							25%
	Feel good																					0%							38%
		X		X	X	X	X	X		X	X	X	X	X	X	X	X		X	X	X	83%							88%
	Make new friends	X																				8%							0%
		X																				17%							25%
																						0%							0%
	Benefit other personal relat.																					0%							0%
				X																	17%	0%							

**Table A.4 – VFI motivations and outcomes (part 2)**

Themes & sub-themes		<35	35-40		41-55			56-64			65+		41-55	56-64		65+					% of mentors discussing sub-theme		N. of times each theme is discussed						
		F	M	F	M	F	M	F	M	F	F	M	F	F	M	F	F	F	F	F			F	As a mot.	As an out.	Total	As a mot.	As an out.	Total
		Celine	Bernie	Eloise	Patrick	Giselle	Edwin	Phoebe	Neil	Diane	Sally	Albert	Vivian	Amanda	Anne	Cindy	Rupert	Sara	Pam	Jane			Lily	S	I	Scotland			Italy
PROTECTIVE	Feel less lonely	X					X					X									8%	0%	4	5	9	2	1	3	
	Relieve of guilt			X				X													17%	0%							
	Escape from work life	X													X						8%	13%							
		X		X			X						X								25%	13%							
	Secure future pension																X				0%	13%							
CAREER	Reinforce found. knowledge	X																			8%	0%	2	7	9	0	0	0	
		X				X															17%	0%							
	Build skills		X																		8%	0%							
			X			X															17%	0%							
	Improve work relat.							X													0%	0%							
SOCIAL	Career clarification																				17%	0%	1	2	3	0	0	0	
				X																	8%	0%							
	Implicit expectations	X																			8%	0%							
																					0%	0%							
	Benefit other personal relat.									X											17%	0%							





**Table A.6 – Negative outcomes and feelings**

Themes & sub-themes		<35		35-40		41-55			56-64			65+		41-55		56-64		65+					% of mentors discussing each sub-theme		N. of times each theme is discussed		
		F	M	F	M	F	M	F	M	F	F	M	F	F	F	M	F	F	F	F	F	F					
		Celine	Bernie	Eloise	Patrick	Giselle	Edwin	Phoebe	Neil	Diane	Sally	Albert	Vivian	Amanda	Anne	Cindy	Rupert	Sara	Pam	Jane	Lily						
		Scotland (S)											Italy (I)											S	I	S	I
Negative Outcomes	Self-esteem...					X																	8%	0%			
Negative Feelings	Hesitation...fear...	X	X			X		X		X	X	X		X	X		X	X					58%	50%			
	Vicarious stress...					X		X	X	X										X			33%	13%			
	Nervousness, anxiety...	X																					8%	0%			
	Discouragement ...frustration			X		X		X	X			X	X	X	X		X		X				50%	50%			
	Disappointment ...upset					X		X				X	X	X			X			X			33%	38%			
	Conflicted... overwhelmed					X				X							X						17%	13%			
	Shame, guilt					X								X									8%	13%			
		84%											88%														



**Table A.7 – Facilitators and barriers (programmatic)**

Themes & sub-themes		<35	35-40		41-55			56-64			65+		41-55		56-64		65+					% of mentors discussing sub-theme		N. of times each theme is discussed						
		F	M	F	M	F	M	F	M	F	F	M	F	F	F	F	M	F	F	F	F									
		Celine	Bernie	Eloise	Patrick	Giselle	Edwin	Phoebe	Neil	Diane	Sally	Albert	Vivian	Amanda	Anne	Cindy	Rupert	Sara	Pam	Jane	Lily	S	I	Scotland			Italy			
COMMITMENT	Time commitment to meet		X		X	X					X											33%	0%	15	3	18	5	2	7	
																						0%	0%							
	Time commitment Program-relevant activities		X		X	X	X						X		X								33%							25%
																						0%	0%							
	Meeting during school hours				X						X		X									17%	13%							
																						0%	0%							
	Prolonged commitment (1 academic year)	X			X			X							X							25%	13%							
				X																	8%	0%								
Distance to travel					X					X				X							17%	13%								
												X							X		0%	25%								
Being acknowledged			X			X															0%	0%								
							X														17%	0%								
SUPPORT	Awareness on mentoring & outcomes									X		X										0%	0%	8	24	32	5	12	17	
												X										17%	0%							
	Role awareness & clarity				X	X						X										25%	0%							
									X	X												17%	0%							
	Initial guidance & training					X														X		8%	13%							
	Supervision & staff support	X				X						X				X		X				25%	25%							
		X	X	X	X	X	X	X	X	X	X			X	X		X	X		X		92%	63%							
Structured schedule of activities											X										8%	0%								
			X	X																	17%	0%								
Weekly journals & final papers													X			X	X				0%	38%								
										X					X						8%	13%								

	Match-making process				X																8%	0%	
		X					X						X	X								17%	25%
	Tailored and flexible approach																					0%	0%
							X	X			X		X	X		X						25%	38%

**Table A.8 – Facilitators and barriers (relational)**

Themes & sub-themes	<35		35-40		41-55			56-64			65+		41-55		56-64			65+					% of mentors discussing sub-theme		N. of times each theme is discussed					
	F	M	F	M	F	M	F	M	F	F	M	F	F	F	M	F	F	F	F	F	F	S								
	Celine	Bernie	Eloise	Patrick	Giselle	Edwin	Phoebe	Neil	Diane	Sally	Albert	Vivian	Amanda	Anne	Cindy	Rupert	Sara	Pam	Jane	Lily	Scotland	Italy	Scotland	Italy	Scotland	Italy				
Scheduling conflicts					X						X											17%	0%	24	21	45	10	15	25	
																						0%	0%							
Extent, regularity or frequency of comm./contact		X	X	X				X			X				X	X		X		X		42%	50%							
															X							0%	13%							
Depth and quality of the connection/ comm.								X														8%	0%							
						X	X				X	X			X							33%	13%							
Differences with mentee	X				X					X	X				X	X	X					33%	38%							
	X			X				X		X				X								33%	13%							
Match closes (prematurely) or is not carried over					X		X	X	X								X	X				33%	25%							
																						0%	0%							
(Prior) experiences or not seeing/ seeing the change						X	X	X		X		X				X						42%	13%							
	X		X	X		X	X		X	X	X	X	X	X		X		X		X		75%	63%							
Mentee involved in decision-making												X				X						0%	0%							
																X						8%	13%							
Reduced focus on instrumental activities	X				X																	17%	0%							
		X			X								X	X	X					X		17%	50%							
Explaining, teaching, sharing																						0%	0%							
										X					X	X						8%	25%							
Provoking statements									X													8%	0%							
																						0%	0%							

**Table A.9 – Facilitators and barriers (individual)**

Themes & sub-themes		<35	35-40		41-55			56-64			65+		41-55		56-64		65+					% of mentors discussing sub-theme		N. of times each theme is discussed					
		F	M	F	M	F	M	F	M	F	F	M	F	M	F	F	F	F	F	F									
		Celine	Bernie	Eloise	Patrick	Giselle	Edwin	Phoebe	Neil	Diane	Sally	Albert	Vivian	Amanda	Anne	Cindy	Rupert	Sara	Pam	Jane	Lily	S	I	Scotland			Italy		
MENTEE	Mentee's attributes or socio-demogr.			X	X				X					X							25%	13%	7	5	12	2	3	5	
	X			X				X		X		X	X				X			X	42%	38%							
	X				X			X		X							X				33%	13%							
	Mentee's personal issues																				0%	0%							
MENTOR	Mentor's expectations (met, unmet, re-adjusted)				X		X	X													25%	0%							
				X			X	X									X				25%	13%							
	Mentor's attributes or socio-demogr.			X					X							X					17%	13%							
					X	X	X	X				X			X		X	X	X	X	42%	50%							
	Mentor is passionate about something																				0%	0%							
														X							0%	13%							
	Mentor empathizes					X															8%	0%							
																					0%	0%							
	Self-efficacy	X		X	X	X		X		X	X			X	X	X	X	X		X	58%	75%							
				X	X	X				X			X	X		X				X	42%	50%							
	Not underst. what went wrong					X															8%	0%							
																					0%	0%							
Cost-benefit imbalance								X	X											17%	0%								
																				0%	0%								
Investment size (high)					X															8%	0%								
																				0%	0%								
Alternatives																				0%	0%								



**Table A.10 – Facilitators and barriers (broader ‘social ecology’ and others)**

Themes & sub-themes			<35	35-40		41-55			56-64			65+		41-55		56-64		65+					% of mentors discussing sub-theme		N. of times each theme is discussed												
			F	M	F	M	F	M	F	M	F	F	M	F	F	F	M	F	F	F	F																
			Celine	Bernie	Eloise	Patrick	Giselle	Edwin	Phoebe	Neil	Diane	Sally	Albert	Vivian	Amanda	Anne	Cindy	Rupert	Sara	Pam	Jane	Lily			S	I	Scotland			Italy							
BROADER SOCIAL ECOLOGY	FELLOW MENTORS	Other mentors (adult/former) as role models	X		X			X								X			X				0%	0%	1	8	9	0	7	7							
		Structured group format facilitation			X												X			X	X			8%							0%						
		Group setting for mentoring meetings		X		X	X		X		X				X					X	X			0%							13%						
	F&F	Family and friends	X				X			X		X	X	X		X	X						0%	0%	0	5	5	0	3	3							
		Mentee's parents or guardian															X						0%	0%	0	0	0	0	1	1							
	HOME INSTITUTION	Workplace-initiated or service-learning activity								X													0%	0%	2	8	10	0	0	0							
		Commitment from organizational leaders				X		X			X												0%	0%													
		Scheduling flexibility	X		X		X				X													17%							0%						
	T	Teachers and school staff			X		X	X					X	X	X		X	X	X	X	X		8%	25%	1	3	4	2	7	9							
	OTHERS	Meeting (spaces) at school								X		X		X			X	X	X	X	X		0%	63%	8	6	14	14	2	16							
Perceived financial responsibility								X									X					8%	13%														
																						0%	0%														



## **Appendix B**

### **Technical notes**

#### **1. Translation and data collection phases**

For the measurement scales not previously translated and validated in Italian, the translation process started with a forward translation by independent translators: the first author and key representatives of SU (all Italian native speakers). Whilst the former had content expertise and a theoretical acquaintance of the research area under investigation, the latter approached the translation with rooted field expertise. Next, forward translators revised the outputs produced, discussed discrepancies and combined competing formulations into a unified version, selecting the items of each translation in such a way to retain, as much as possible, the literal meaning and original wording of items, but also to enhance the clarity and naturalness of the translation, as well as the linguistic and cultural applicability of items (van de Vijver, 2015). As to the verbatim quotes extracted from Italian interviews, these were translated by the first author, to allow for cross-cultural meanings and interpretations (Temple & Young, 2004). Qualitative and quantitative data collection were conducted concurrently, between: the 15<sup>th</sup> and 30<sup>th</sup> of January 2021 (questionnaire Scotland); the 22<sup>nd</sup> of January and the 26<sup>th</sup> of April (interviews Scotland); the 15<sup>th</sup> of June and 30<sup>th</sup> of July (questionnaire Italy); 21<sup>st</sup> of July and 6<sup>th</sup> of September (interviews Italy).

#### **2. Measurement scales: reliability and construct validity**

Permission to use the inventories from their authors was sought and obtained. It has to be noted that, although seeking to preserve comparability of meaning, the wording of some items was slightly changed, also as a result of the pre-test conducted (for instance, to account for the site-based nature of the SBM programs analyzed or enhance items' fit with the organizational culture, language and practices in use).

As shown below (Table B.1), the Cronbach's alphas of all the sub-scales are higher than .60, with internal consistency scores ranging from acceptable ( $.60 \leq \alpha \leq .70$  in 22% of the cases) to excellent ( $\alpha \geq .90$  in 22% of the cases). It was thus concluded that all the scales used in the analyses had satisfactory levels of internal consistency.

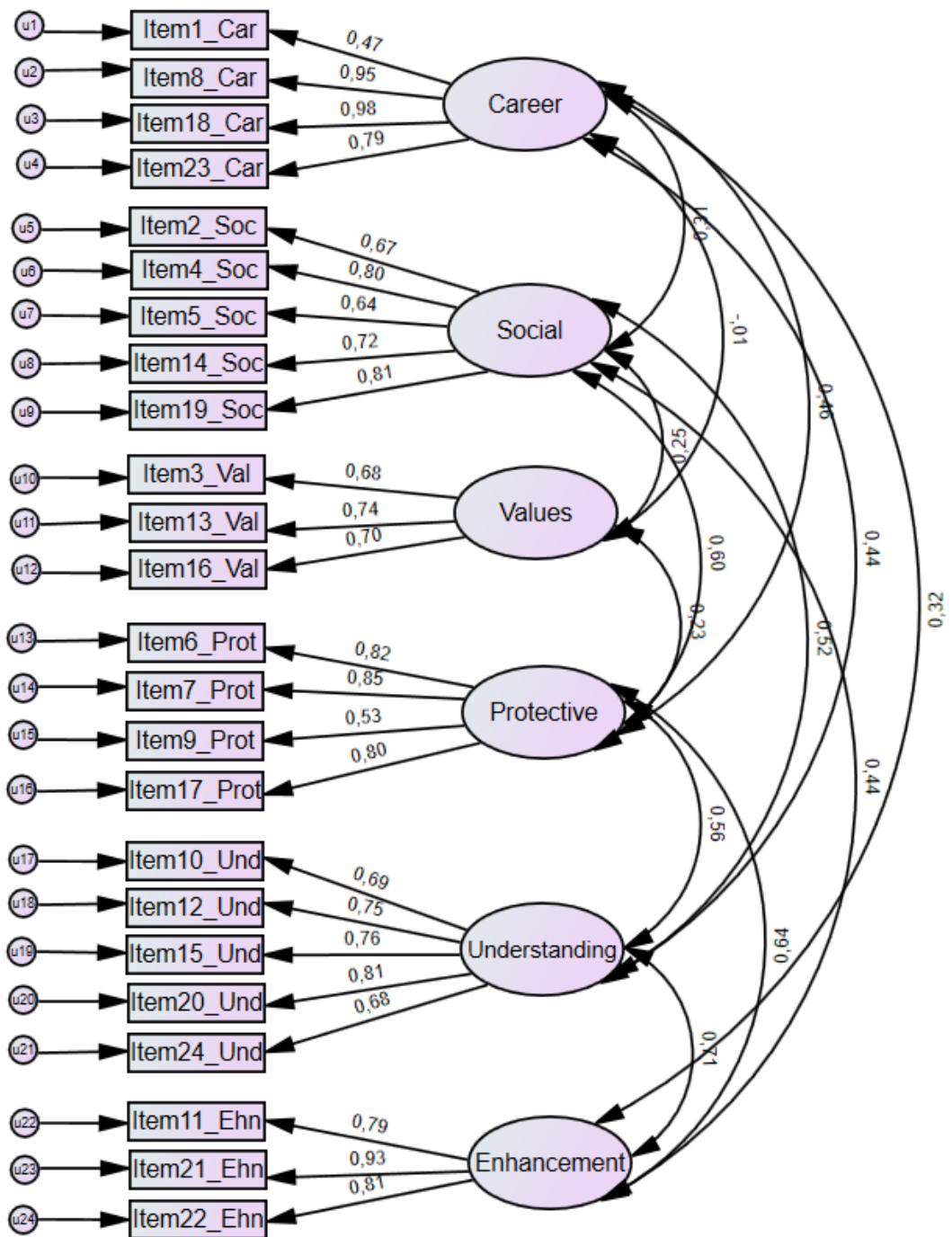


**Table B.1: Reliability coefficients**

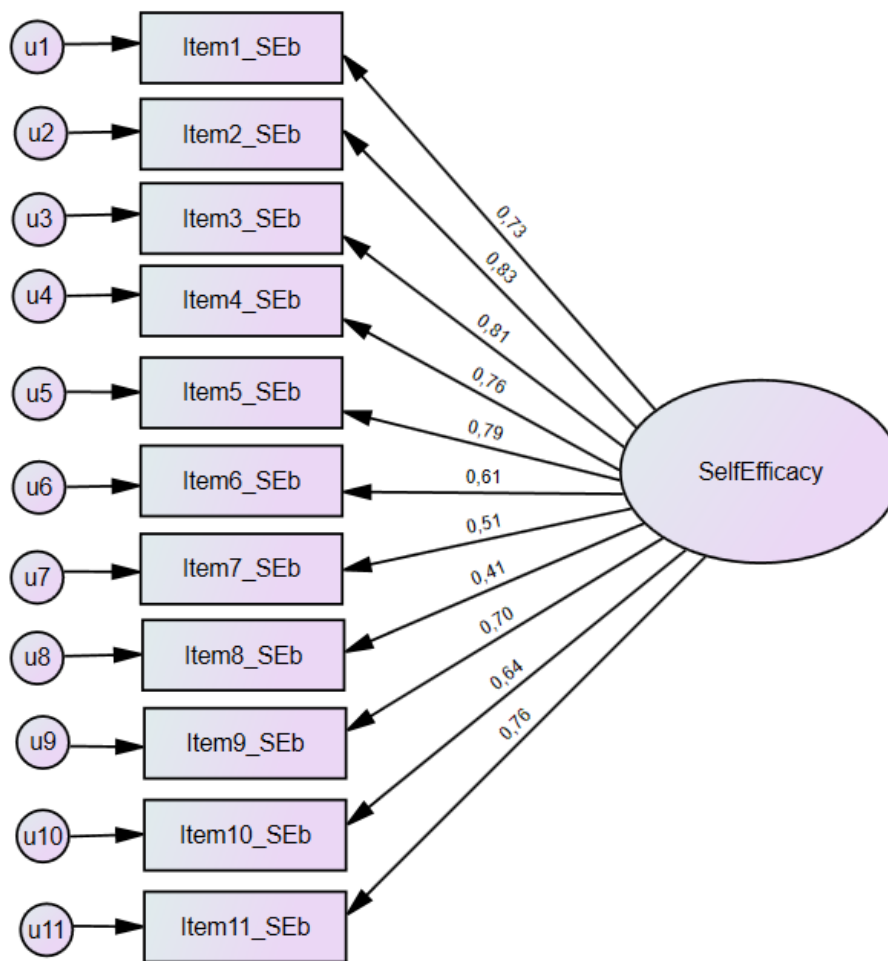
Multi-item scale	Cronbach's alpha	
	MCR	SU
Career	0.85	0.84
Social	0.84	0.85
Values	0.88	0.67
Protective	0.61	0.89
Understanding	0.79	0.87
Enhancement	0.70	0.87
Self-efficacy	0.91	0.90
Program support	0.94	0.93
Negative emotions	0.69	0.60

Confirmatory factor analysis (CFA) was subsequently implemented to assess the factor structure of scales with more than three items per factor. Given that all the standardized factor loadings were higher than 0.4 (Figures B.1, B.2 and B.3), all the items were retained. Furthermore, all these parameters were highly significant ( $p < .001$ ).

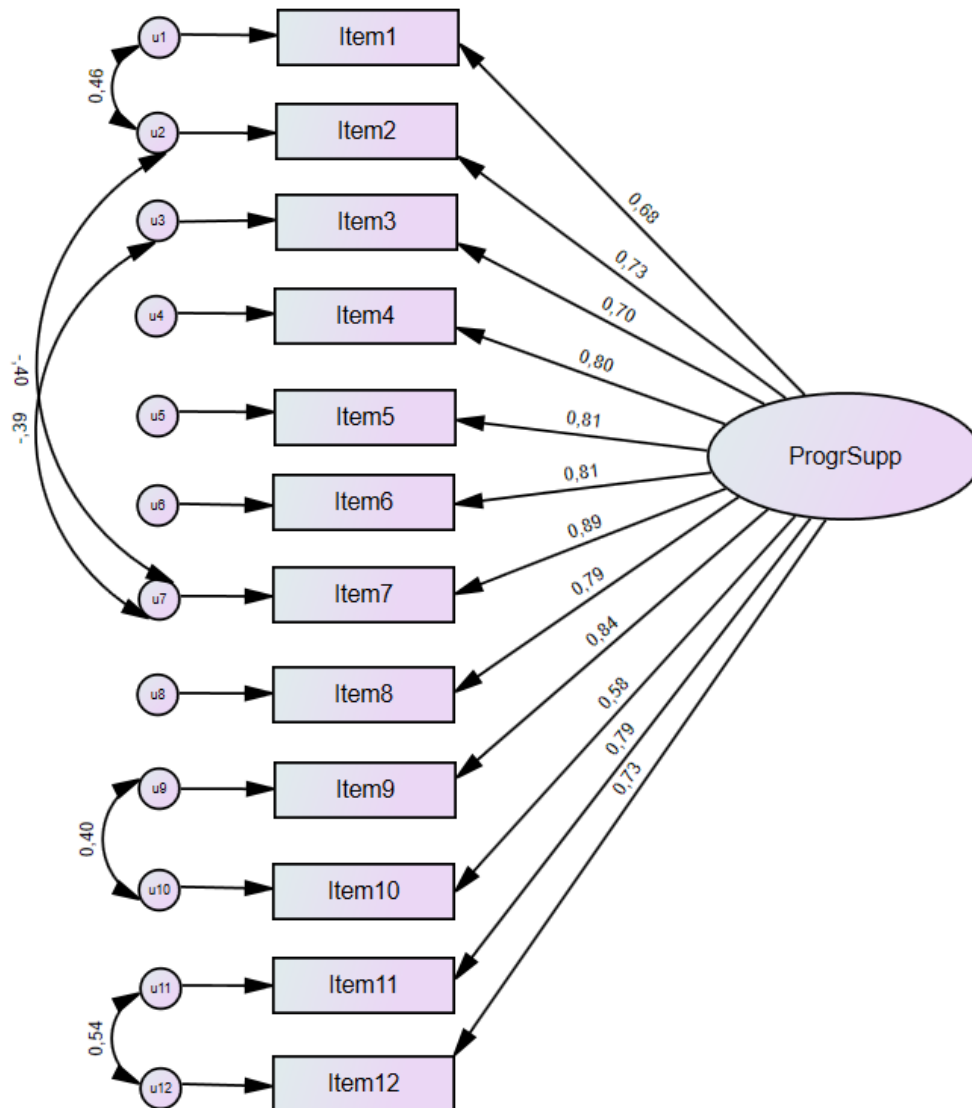
**Figure B.1: Confirmatory factor analysis findings (Volunteer Functions Inventory)**



**Figure B.2: Confirmatory factor analysis findings (Self-efficacy at baseline)**



**Figure B.3: Confirmatory factor analysis findings (Program support)**



Additionally, four goodness-of-fit indices were considered. The cut-off values respectively recommended, as indicative of good model fit, are: i) CMIN/df below 5; ii) TLI and CFI near 0.90 or higher; iii) RMSEA below 0.08-0.10. Given the results obtained (Table B.2), model fit was deemed acceptable.

**Table B.2: Model fit statistics (CFA)<sup>56</sup>**

Scale	Model	CMIN/df	TLI	CFI	RMSEA
Volunteer Functions Inventory	Six correlated factors	1.653	.867	.894	.076
Self-efficacy	One-factor model	1.730	.946	.918	.080
Program support	One-factor model	1.955	.940	.955	.092

### 3. Response rates and representativeness

For MCR, out of the 255 randomly selected active mentors invited to complete the questionnaire, 54 provided some information. Listwise deletion was adopted to exclude from the analysis those mentors who had a person-level missingness rate  $\geq 65\%$  ( $n = 12$ ). Hence, the final sample consisted of 42 full or partial respondents. For SU, all the 203 active mentors across Italy were invited to take part. Similarly, of them, 90 replied and 72 respondents were retained. Instead, some were discarded as having a person-level missingness rate  $\geq 65\%$  ( $n = 15$ ) or as being first-time mentors with reported 0 months of mentoring experience ( $n = 3$ ). Given the respective population sizes, estimates are expected to differ about  $\pm 10$  percentage points (MCR) and  $\pm 6$  percentage points from the real population value 85% of the times.

In terms of gender and age, for MCR, information about these two key demographic variables is available for 95% of respondents (40 out of 42), whereas the gender and age makeup of mentors who did not respond were calculated by difference between the sample frame distributions and those observed among respondents. Pearson's chi-square test was used to examine whether these known variables were differently distributed between respondents and non-respondents. There were no significant

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<sup>56</sup> Abbreviations: CMIN, chi-square minimum; df, degree of freedom; CFI, comparative fit index; TLI, Tucker-Lewis index; RMSEA, root mean square error of approximation.

differences detected between the respondents and the non-respondents in terms of gender [ $\chi^2(1, N = 209) = 0.0046, p > .05$ ]. Similarly, when considering the two age groups of mentors under 40 (21,5%) and over 40 years of age (78,5%), the difference between respondents and non-respondents was non-significant [ $\chi^2(1, N = 254) = 1.37, p > .05$ ]. For SU, this test could not be performed, as only three out of the four organizational branches involved in the study were able to provide information on the distribution of their mentors across genders and age groups.

Beyond the key socio-demographics illustrated in the article, it is worth highlighting that, in terms of educational level or occupational status when they started mentoring, most of respondents from MCR (83%) reported having completed post-secondary education and 60% being in some form of employment or training. About 70% of them were at their first MR and, for 29% of participants, the most recent MR lasted less than 1 year. Also, 45% had volunteering experiences at other organizations (in the period between the year before joining MCR and the collection of data) and 7% in fields related to youth or schools. For SU, a lower share of respondents had completed post-secondary education (42%) and, given their older age, only 35% reported being employed or in training schemes. Also, 36% were first-time mentors and 26% had a most recent MR that lasted less than 1 year. As with MCR, 43% of them had other volunteering experiences and 8% in youth-related fields.

#### **4. Item-level missingness**

Missing data comprised both the cases where the respondents did not visualize (empty cell) or answer a question (-99) and those where they purposely selected the option “Not applicable/ Prefer not to say” (0). These values were treated as follows. Firstly, when strongly justified, some missing values were imputed by cross-checking the information provided by the same respondent. Thus, for instance, a value of 0 or -99 was substituted by “1” (“Not at all important” or “Strongly disagree”) for career-related motivations and outcomes, when the respondent indicated to be retired from work at baseline. Some values were, instead, missing by design. For instance, the question concerning “normative commitment” was displayed only by those respondents for whom it could be pertinent/applicable (i.e.,

low satisfaction but high intention to continue). Thus, the imputed value for the remaining respondents was set to “1” (i.e., “Strongly disagree”). Finally, following Newman's recommendations (2014), for all the multi-item scales, the mean of available items method, also referred to as “mean substitution across items (and within an individual)” or “meanperson imputation” approach, was used. To be safeguarded against the risk that some items were left blank inasmuch “extreme items” (i.e., those for which respondents are reluctant to answer because the item discloses sensitive information) or because irrelevant to some persons (e.g., career-related motivations for respondents who retired from work), the test recommended by Newman (2014, p. 406) was run on the Scottish dataset. In particular, for every composite scale, it was checked whether an item had a mean larger than two standard deviations compared to the mean of all the items belonging to the same sub-scale. The results indicated that in all instances, the mean of available items method was suitable. To preserve consistency, the imputed means were rounded to the nearest integer. The same approach was applied to data from Italian respondents.

## **5. Construct-level missingness**

Once performed the imputations described above, the rate of construct-level missingness for the variables in the dataset was calculated (Table B.3). Overall, the percentage of missing observations for each variable was below or equal to 10% and the rate of missingness in the full dataset was 4%. Furthermore, Little's MCAR test was performed to assess what missing data mechanism was most likely at work in the dataset, thus testing the plausibility of the assumption that data are Missing Completely At Random (MCAR). The test returned the following values: chi-square = 270.691, df = 280, Sig. = 0.644. The large p-value ( $> 0.05$ ) suggests that there is weak evidence against the null hypothesis that the missing data is MCAR. Hence, data appear not be Missing At Random or non-randomly and missingness seems to be ignorable. For all these reasons, complete case analysis was preferred over other imputation techniques (Jakobsen et al., 2017; Newman, 2014).

**Table B.3: Construct-level missingness**

<b>Construct</b>	<b>Missingness</b>
FIRST_TIME_MENTOR	0%
MONTHS_MENT_EXP	2%
M_CAREER	9%
M_SOCIAL	2%
M_VALUES	2%
M_PROTECT	8%
M_UNDERST	2%
M_ENHANCE	4%
M_GIVE BACK	9%
BASELINE_SELF_EFF	2%
MENTEE_AGE	0%
MATCH_LENGTH	5%
PR SUPP_4	1%
PR SUPP_5	1%
PR SUPP_6	1%
PR SUPP_7	1%
SAT_PROGR_SUPP	1%
BEN_CAREER	10%
BEN_SOC	6%
BEN_VAL	4%
BEN_PROT	7%



BEN_UND	4%
BEN_EHN	7%
NEG_EM	6%
OVERALL_SAT	4%
COMMIT_1YR	5%
NORMATIVE_COMM	8%
MENTOR_SEX	8%
MENTOR_AGE	3%
JOB_BASELINE	8%
<b>FULL DATASET</b>	<b>4%</b>

## 6 Multiple linear regressions

### 6.1 Variable selection

Alongside the predictor of primary interest (namely, respondent's country of reference), gender, age and months of mentoring experience were generally included as control variables to increase the confidence that detected differences in study participants' outcomes were not to be attributed to these additional sources of variance.

Indeed, the effects of gender and age on motivation to volunteer have been widely documented both by studies focused on other types of volunteering (Clary et al., 1996; Penner & Finkelstein, 1998; Stukas et al., 2016) and on youth mentoring (Caldarella et al., 2010; Karcher et al., 2006; Miranda-Díaz et al., 2020). Evidence also suggests that the motivations endorsed by a volunteer can, in turn, affect the extent to which some positive and negative outcomes are experienced (Cavell et al., 2018; Cornelis et al., 2013; Konrath et al., 2012; Morse et al., 2020; Stukas et al., 2016). Additionally, prior research has shown that certain motivational functions can be associated with satisfaction with volunteering, length of service and volunteer

tenure (Clary & Orenstein, 1991; Cornelis et al., 2013; Karcher & Lindwall, 2003; Omoto & Snyder, 1995; Penner & Finkelstein, 1998; Rubin & Thorelli, 1984; Stukas et al., 2016).

As regards the third control variable, this was included to account for the strong imbalance, between the two samples, in terms of average months of mentoring experience reported by respondents (SU = 68; MCR = 26). Furthermore, although prior studies seem to suggest that – for the majority of mentors – perceived self-efficacy is relatively stable over time (Boat et al., 2019; Larose, 2013), a non-negligible part of them (30-37%) display positive changes as the mentoring experience progresses. Mentors' efficacy beliefs are not only critical to mentor's and mentee's perceptions of relationship quality (Deane et al., 2022; Karcher et al., 2005), but also related to the amount of contact with youth and relational obstacles met, mentors' degree of involvement in other program-relevant activities and mentee's outcomes (Parra et al., 2002).

Given the strong theoretical reasons supporting the inclusion of these control variables and the risks of the univariate screening method (Feng et al., 2016), even “non-significant” predictors ( $p > 0.20$ ) were retained for multivariate analyses (Table B.4).

**Table B.4: Results of univariate linear regressions**

			Unstandardized Coefficients		Standardized Coefficients	t	Sig.	95,0% CI for B	
			B	Std. Error	Beta			Lower Bound	Upper Bound
Dependent Variable: Motivation Understanding	1	(Constant)	3.949	0.185		21.332	0.000	3.582	4.316
		Months of mentoring experience	0.003	0.003	0.095	0.991	0.324	-0.003	0.008
	2	(Constant)	2.686	0.442		6.073	0.000	1.809	3.562
		Country	0.843	0.261	0.294	3.232	<b>0.002</b>	0.326	1.360
	3	(Constant)	3.315	0.465		7.123	0.000	2.392	4.238
		Mentor gender	0.397	0.267	0.147	1.489	<b>0.140</b>	-0.132	0.925
	4	(Constant)	3.820	0.567		6.736	0.000	2.696	4.944
Mentor age group		0.050	0.129	0.037	0.388	0.699	-0.206	0.307	
Dependent Variable: Motivation Enhancement	1	(Constant)	3.130	0.215		14.532	0.000	2.703	3.558
		Months of mentoring experience	0.007	0.003	0.227	2.405	<b>0.018</b>	0.001	0.013
	2	(Constant)	0.312	0.446		0.699	0.486	-0.572	1.195
		Country	1.958	0.264	0.581	7.422	<b>0.000</b>	1.435	2.481
	3	(Constant)	3.158	0.565		5.592	0.000	2.037	4.278

	4	Mentor gender	0.160	0.324	0.049	0.494	0.622	-0.483	0.803
		(Constant)	1.291	0.636		2.030	0.045	0.030	2.552
		Mentor age group	0.512	0.146	0.325	3.518	<b>0.001</b>	0.223	0.801
Dependent Variable: Self-efficacy	1	(Constant)	2.442	0.081		29.986	0.000	2.281	2.603
		Months of mentoring experience	-0.001	0.001	-0.074	-0.772	0.442	-0.003	0.001
	2	(Constant)	2.922	0.199		14.687	0.000	2.527	3.316
		Country	-0.331	0.117	-0.260	-2.822	<b>0.006</b>	-0.564	-0.099
	3	(Constant)	2.220	0.210		10.568	0.000	1.803	2.636
		Mentor gender	0.089	0.120	0.074	0.743	0.459	-0.149	0.328
	4	(Constant)	2.577	0.252		10.234	0.000	2.078	3.076
		Mentor age group	-0.047	0.057	-0.079	-0.817	0.416	-0.161	0.067
Variable: Negative	1	(Constant)	2.066	0.133		15.554	0.000	1.802	2.329
		Months of mentoring experience	0.002	0.002	0.088	0.898	0.371	-0.002	0.005
	2	(Constant)	1.984	0.336		5.907	0.000	1.318	2.650
		Country	0.095	0.196	0.047	0.484	0.629	-0.294	0.484

## 6.2 Assumptions

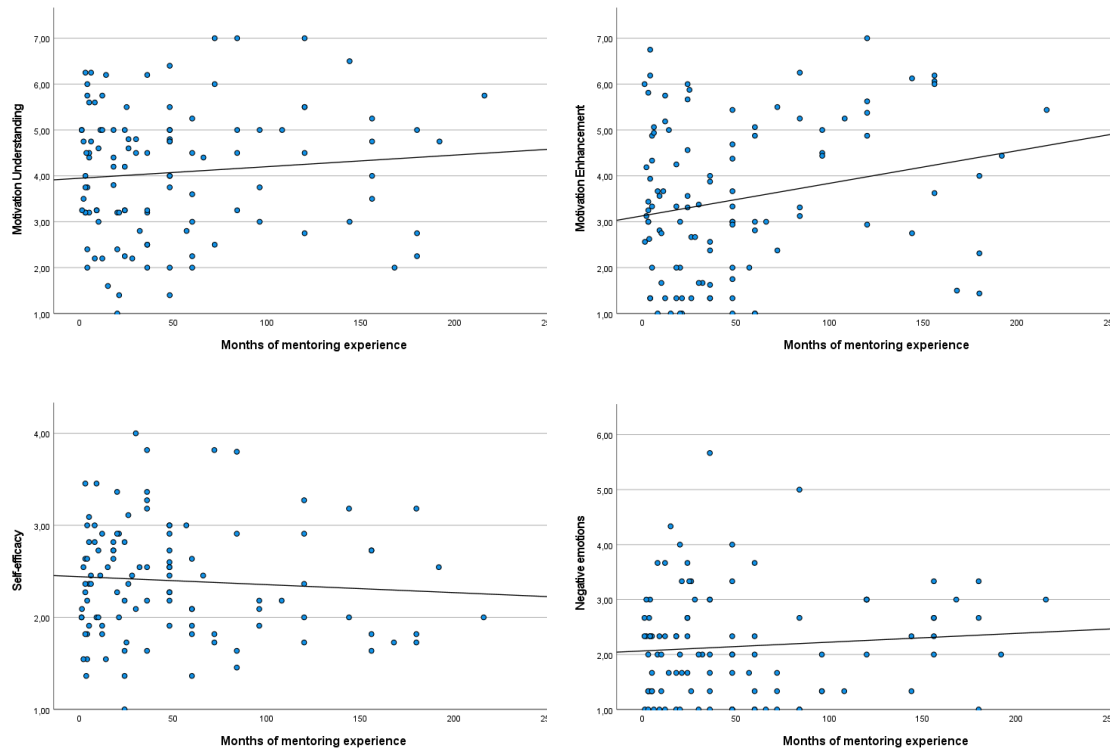
Standardized Residuals and Cook's Distance statistics were analyzed to identify any outliers or influential cases potentially biasing the models. The results at Table B.5 show that no observation had to be removed, given that the Standardized Residuals were always less than  $\pm 3$  and the Cook's Distance scores below 1.

**Table B.5: Residuals Statistics**

		Min	Max	Mean	Std. Deviation
Dependent Variable: Motivation Understanding	Std. Residual	-2.002	2.379	.000	.980
	Cook's Distance	.000	.115	.011	.018
Dependent Variable: Motivation Enhancement	Std. Residual	-2.058	2.455	.000	.980
	Cook's Distance	.000	.123	.011	.017
Dependent Variable: Self-efficacy	Std. Residual	-2.340	2.588	.000	.980
	Cook's Distance	.000	.075	.010	.015
Dependent Variable: Negative emotions	Std. Residual	-1.568	2.277	.000	.979
	Cook's Distance	.000	.095	.010	.014

The following scatterplots (Figure B.4) suggest that there is an extremely weak/no linear correlation between our four dependent variables and months of mentoring experience. Albeit scarcely (or not) correlated with the outcomes, the variable was retained for the multivariate analyses as deemed a potentially relevant component of multiple regressions (Feng et al., 2016). Furthermore, in the graphs there is no obvious indication of non-linear relationships between variables.

**Figure B.4: Relationship between dependent variables and months of mentoring experience**



The analysis of correlations and other collinearity statistics (Variance Inflation Factor, or VIF, and Tolerance scores) led to exclude issues of multicollinearity among predictors. Indeed, correlations were below 0.7, while the values of VIF and Tolerance respectively below 10 and above 0.1.

**Table B.6: Correlations and collinearity statistics**

		Correlations			Collinearity Statistics	
		Zero-order	Partial	Part	Tolerance	VIF
Dependent Variable: Motivation Understanding	Country	0.288	0.288	0.283	0.645	1.551
	Months of mentoring experience	0.118	0.014	0.014	0.786	1.272
	Mentor gender	0.157	0.109	0.103	0.935	1.069
	Mentor age group	0.037	-0.125	-0.119	0.650	1.539
Dependent Variable: Motivation Enhancement	Country	0.583	0.487	0.453	0.648	1.543
	Months of mentoring experience	0.244	-0.001	-0.001	0.787	1.270
	Mentor gender	0.070	0.031	0.025	0.935	1.069
	Mentor age group	0.334	0.035	0.028	0.652	1.534
Dependent Variable: Self-efficacy	Country	-0.313	-0.329	-0.325	0.645	1.551
	Months of mentoring experience	-0.095	-0.002	-0.002	0.786	1.272
	Mentor gender	0.087	0.144	0.136	0.935	1.069
	Mentor age group	-0.087	0.127	0.120	0.650	1.539

Dependent Variable: Negative emotions	Country	-0.015	-0.110	-0.109	0.617	1.620
	Months of mentoring experience	0.091	0.074	0.073	0.784	1.276
	Mentor gender	0.036	0.052	0.051	0.939	1.065
	Mentor age group	0.096	0.118	0.117	0.609	1.642



Given the non-longitudinal nature of data, autocorrelation did not represent a concern. As expected, the values of the Durbin-Watson statistic (Table B.7) – not significantly different from 2 – show that the assumption of independent or uncorrelated residuals is met. Furthermore, to account for the spatial clustering potentially affecting the Italian sample (i.e., mentors operating in different areas: Milan, Trento, Naples, Rome), a fully unconditional null model was estimated to ascertain whether multi-level analysis could represent a more suitable analytic strategy. As shown by the results below (Table B.8), for the first three models, the absence of variability in intercepts between subjects (i.e., areas) results in the parameter becoming redundant. When considering “Negative emotions” as the dependent variable, the intraclass correlation coefficient for the model equals 0.014 or 1.4%, hence justifying the use of single-level regression analysis. The same check could not be performed to account for the clustering of mentors across schools, primarily due to: i) lack of information on this aspect (for SU); ii) the excessive dispersion of respondents across schools and the mobility frequently experienced by mentors (for MCR). In fact, a substantial share of Scottish respondents (about one quarter) reported that they operated in different schools between the onset of their mentoring experience and the moment of data collection.

**Table B.7: Durbin-Watson statistic**

	Durbin-Watson
Motivation Understanding	1.646
Motivation Enhancement	1.786
Self-efficacy	2.217
Negative emotions	2.437

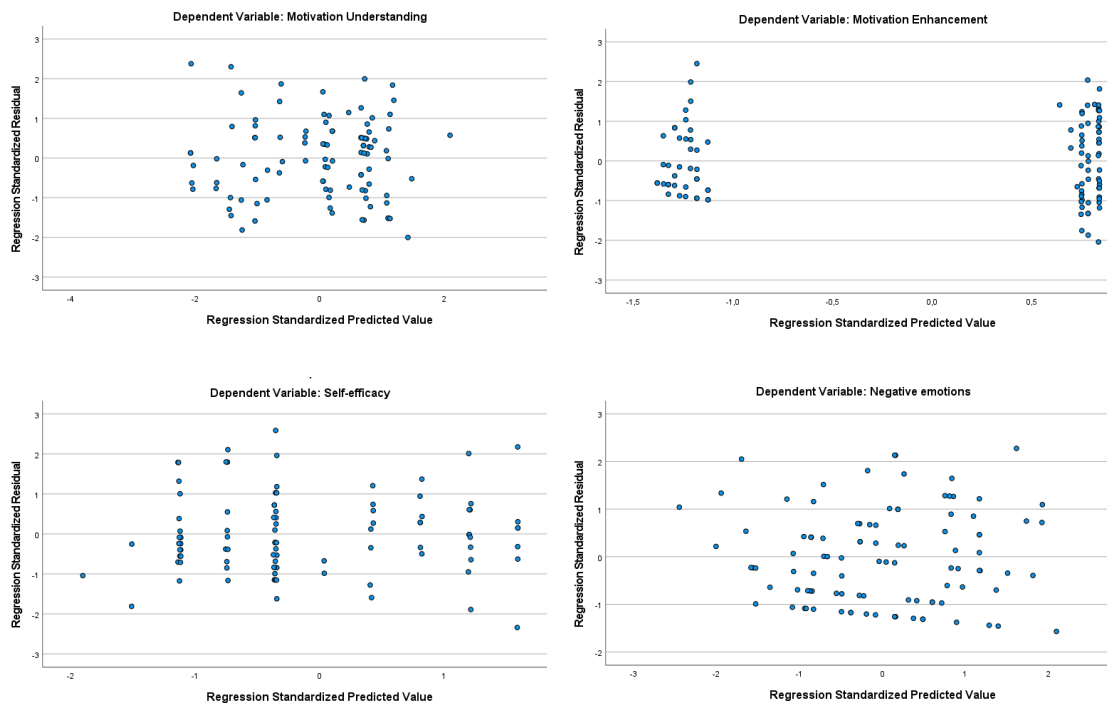
**Table B.8: Estimates of Covariance Parameters (SU)**

			Estimate	Std. Error	Wald Z	Sig.	95% CI	
							Lower Bound	Upper Bound
Motivation	Residual		1.615036	0.276976	5.831	0.000	1.153991	2.260279
Understanding	Intercept [subject = AREA]	Variance	.000000 <sup>a</sup>	0.000000				
Motivation	Residual		2.029754	0.353335	5.745	0.000	1.443006	2.855081
Enhancement	Intercept [subject = AREA]	Variance	.000000 <sup>a</sup>	0.000000				
Self-efficacy	Residual		0.363202	0.062289	5.831	0.000	0.259518	0.508309
	Intercept [subject = AREA]	Variance	.000000 <sup>a</sup>	0.000000				
Negative emotions	Residual		0.947809	0.164378	5.766	0.000	0.674680	1.331510
	Intercept [subject = AREA]	Variance	0.013797	0.054149	0.255	0.799	6.295119E-06	30.237599

a. This covariance parameter is redundant. The test statistic and confidence interval cannot be computed

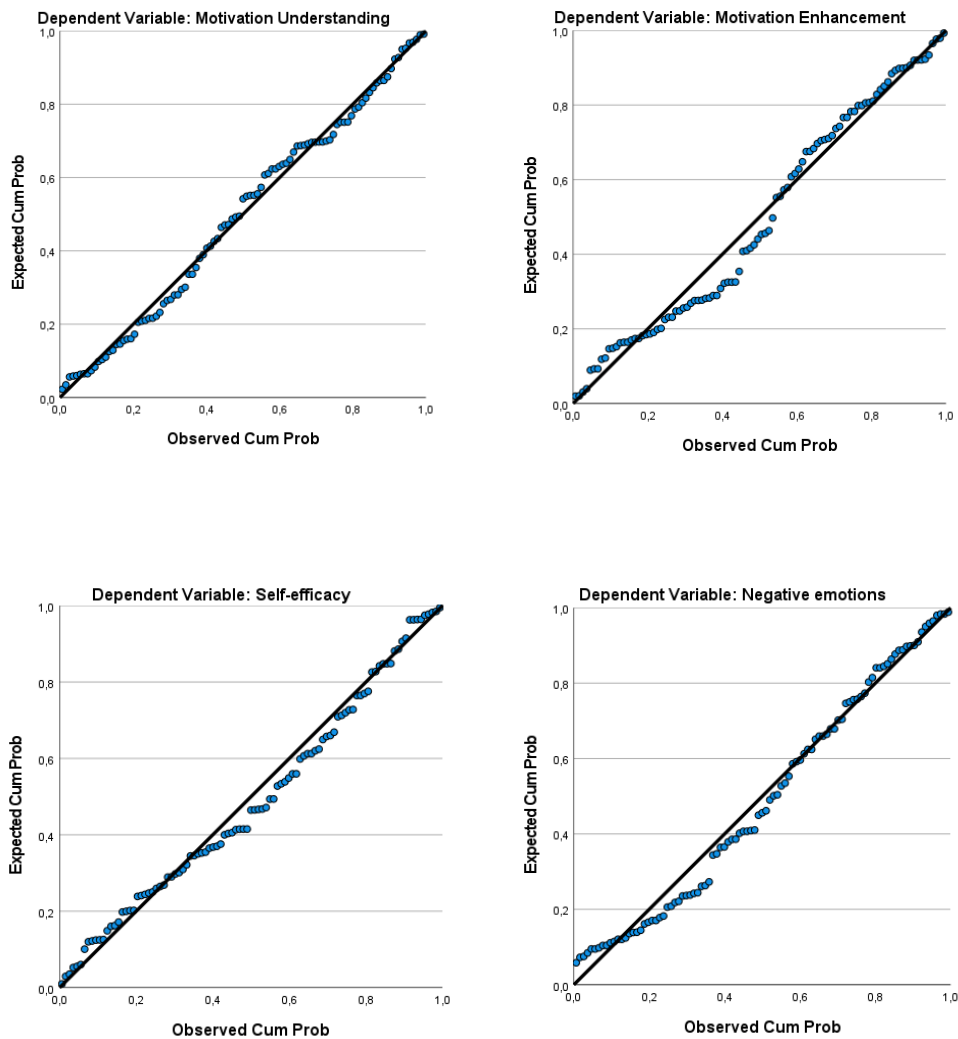
To check whether the variance of the residuals was homogeneous at each point of the predictor variables (homoscedasticity), the scatter plots of Standardized Residuals by the regression Standardized Predicted Values were visually inspected. As shown below (Figure B.5), there was no obvious sign of funneling and, hence, no evidence of heteroscedasticity. The Breusch-Pagan and Koenker test statistics (all displaying  $p > .05$ ) further supported this conclusion.

**Figure B.5: Scatterplots of standardized residuals**



The P-P plots for the models (Figure B.6) allowed testing the assumption that the values of the residuals are normally distributed. The reasonable closeness of data points to the line indicates that there is no evidence of extreme deviations from normality (those likely to have a significant impact on findings and compromise the validity of results).

**Figure B.6: Normal P-P plots of Regression Standardized Residuals**



### 6.3 Results

Here below (Table B.9), the full results of the multiple linear regressions are reported. Except for the fourth model, significant regression equations were found, although the proportion of variance explained by the independent variables turned out to be relatively limited (max  $R^2 = 0.342$ ). This is not *per se* problematic, as the models are not meant to be used for predictive purposes (Moksony, 1999).

**Table B.9: Results of multivariate linear regressions**

		Unstandardized Coefficients		Standardized Coefficients	t	Sig.	Overall Sig.	R <sup>2</sup>
		B	Std. Error	Beta				
Dependent Variable: Motivation Understanding	(Constant)	2.696	0.767		3.513	0.001	F(4, 96) = 3.106, <i>p</i> = <b>0.019</b>	0.115
	Country	0.998	0.339	0.352	2.944	<b>0.004</b>		
	Months of mentoring experience	0.000	0.003	0.015	0.141	0.888		
	Mentor gender	0.288	0.269	0.106	1.070	0.287		
	Mentor age group	-0.191	0.155	-0.147	-1.237	0.219		
Dependent Variable: Motivation Enhancement	(Constant)	-0.002	0.796		-0.003	0.998	F(4, 95) = 12.32, <i>p</i> < <b>0.001</b>	0.342
	Country	1.906	0.350	0.563	5.440	<b>0.000</b>		
	Months of mentoring experience	-2.772E-05	0.003	-0.001	-0.010	0.992		
	Mentor gender	0.085	0.278	0.026	0.305	0.761		
	Mentor age group	0.054	0.160	0.035	0.340	0.735		
Dependent Variable: Self-efficacy	(Constant)	2.561	0.336		7.618	0.000	F(4, 96) = 3.467, <i>p</i> = <b>0.011</b>	0.126
	Country	-0.506	0.149	-0.405	-3.409	<b>0.001</b>		
	Months of mentoring experience	-2.798E-05	0.001	-0.002	-0.023	0.982		

	Mentor gender	0.168	0.118	0.140	1.422	0.158		
	Mentor age group	0.085	0.068	0.149	1.259	0.211		
Dependent Variable: Negative emotions	(Constant)	1.759	0.511		3.445	0.001	F(4, 94) = 0.626, <i>p</i> = 0.645	0.026
	Country	-0.252	0.234	-0.139	-1.076	0.285		
	Months of mentoring experience	0.001	0.002	0.083	0.718	0.474		
	Mentor gender	0.091	0.180	0.053	0.503	0.616		
	Mentor age group	0.122	0.106	0.150	1.148	0.254		

## **7 Ordinal and multinomial logistic regressions**

### **7.1 Assumptions and results**

According to the statistics reported at Table B.10 (VIF <10 and Tolerance > 0.1), for this set of regressions there is no evidence of multicollinearity among predictors.

Ordinal logistic regressions were first run, to assess the results of the test of parallel lines and overall fit of each model. As reported in Table B.11, the proportional odds assumptions did not hold for the dependent variables “Motivation Give Back” and “Ongoing Support”, suggesting that the slope coefficients are not equal across the levels of the outcome variable and that, hence, the use of multinomial logistic models appears more suitable. For the remaining variables, the ordinal logistic regressions were retained, although the results of the last model are not considered, given the unsatisfactory model fit ( $p = 0.22$ ).

In the final tables (B.12-B.15), the results of the models fitted are reported.

**Table B.10: Collinearity statistics**

		Motives & Positive Outcomes		Ongoing Support & Developing Strategies	
		Tolerance	VIF	Tolerance	VIF
Dependent Variable: Country	Months of mentoring experience	0.831	1.203	0.538	1.858
	Mentor gender	0.957	1.044	0.955	1.048
	Mentor age group	0.831	1.204	0.770	1.299
	First-year mentors by organization	-	-	0.513	1.948
Dependent Variable: Months of mentoring experience	Mentor gender	0.956	1.046	0.948	1.055
	Mentor age group	0.676	1.478	0.639	1.564
	Country	0.681	1.469	0.603	1.660
	First-year mentors by organization	-	-	0.701	1.426
Dependent Variable: Mentor gender	Mentor age group	0.675	1.481	0.663	1.508
	Country	0.649	1.540	0.610	1.641
	Months of mentoring experience	0.792	1.263	0.541	1.849
	First-year mentors by organization	-	-	0.483	2.070



Dependent Variable: Mentor age group	Country	0.822	1.216	0.730	1.369
	Months of mentoring experience	0.817	1.224	0.542	1.846
	Mentor gender	0.985	1.015	0.985	1.015
	First-year mentors by organization	-	-	0.492	2.033
	Unsatisfied by altruism	-	-	-	-
Dependent Variable: First-year mentors by organization	Country	-	-	0.637	1.569
	Months of mentoring experience	-	-	0.778	1.285
	Mentor gender	-	-	0.940	1.064
	Mentor age group	-	-	0.644	1.553

**Table B.11: Tests of parallel lines and model fit statistics (ordinal logistic regressions)**

		Test of Parallel Lines			Likelihood Ratio Tests			
		Chi-Square	df	Sig.		Chi-Square	df	Sig.
Dependent Variable: Motivation Give Back	Null Hypothesis				Intercept Only			
	General	77.613	35	<b>0.000</b>	Final	22.238	12	<b>0.035</b>
Dependent Variable: Outcome Career	Null Hypothesis				Intercept Only			
	General	43.695	35	0.149	Final	43.436	7	<b>0.000</b>
Dependent Variable: Outcome Protective	Null Hypothesis				Intercept Only			
	General	19.427	35	0.985	Final	20.087	7	<b>0.005</b>
Dependent Variable: Ongoing Support	Null Hypothesis				Intercept Only			
	General	53.993	30	<b>0.005</b>	Final	16.264	10	0.092
Dependent Variable: Developing Strategies	Null Hypothesis				Intercept Only			
	General	34.656	30	0.255	Final	13.067	10	0.220

**Table B.12: Parameter estimates multinomial regression – Dependent Variable: Motivation Give Back<sup>57</sup>**

		B	Std. Error	Wald	df	Sig.	Exp(B)	95% CI for Exp(B)	
								Lower Bound	Upper Bound
“ Moderately important”	Intercept	.448	2.523	.032	1	.859			
	Country	-.714	.732	.950	1	.330	.490	.117	2.057
	Mentor gender	.902	.547	2.722	1	.099	2.465	.844	7.200
	Months of mentoring experience	-.003	.005	.339	1	.561	.997	.986	1.007
	Mentor age group	-.075	1.320	.003	1	.955	.928	.070	12.342
“ Very important”	Intercept	1.400	2.728	.264	1	.608			
	Country	-2.006	.821	5.967	1	<b>.015</b>	.135	.027	.673
	Mentor gender	.585	.650	.808	1	.369	1.794	.502	6.419
	Months of mentoring experience	-.001	.007	.005	1	.943	.999	.986	1.013
	Mentor age group	.355	1.375	.067	1	.796	1.426	.096	21.091
“ Extremely important”	Intercept	-.707	2.798	.064	1	.801			
	Country	-2.028	.889	5.202	1	<b>.023</b>	.132	.023	.752
	Mentor gender	2.216	.793	7.805	1	<b>.005</b>	9.173	1.938	43.431
	Months of mentoring experience	.003	.007	.217	1	.642	1.003	.990	1.017
	Mentor age group	-.177	1.369	.017	1	.897	.838	.057	12.242

<sup>57</sup> The reference category is: “Scarcely important”. The model shows a good fit [ $\chi^2$  (12, N = 95) = 22.238, p = .035].

**Table B.13: Parameter estimates ordinal regression – Dependent Variable: Outcome Career**

		B	Std. Error	95% Wald CI		Hypothesis Test			Exp(B)	95% Wald CI for Exp(B)	
				Lower	Upper	Wald Chi-Square	df	Sig.		Lower	Upper
Threshold	[Career=1]	-1.911	.5989	-3.085	-.738	10.186	1	.001	.148	.046	.478
	[Career=2]	-1.495	.5925	-2.656	-.334	6.366	1	.012	.224	.070	.716
	[Career=3]	-1.339	.5895	-2.495	-.184	5.162	1	.023	.262	.083	.832
	[Career=4]	-.433	.5699	-1.550	.684	.578	1	.447	.648	.212	1.982
	[Career=5]	.011	.5691	-1.104	1.127	.000	1	.985	1.011	.331	3.085
	[Career=6]	1.016	.5945	-.149	2.182	2.924	1	.087	2.763	.862	8.861
[Mentor age group=1]		.854	.6731	-.465	2.173	1.610	1	.205	2.349	.628	8.786
[Mentor age group=2]		1.736	.5426	.673	2.800	10.241	1	<b>.001</b>	5.677	1.960	16.445
[Mentor age group=3]		.981	.3882	.220	1.742	6.382	1	<b>.012</b>	2.667	1.246	5.707
[Mentor age group=4]		.644	.3114	.034	1.254	4.277	1	<b>.039</b>	1.904	1.034	3.506
[Mentor age group=5]		0 <sup>a</sup>	.	.	.	.	.	.	1	.	.
Country		-1,039	.2916	-1.611	-.468	12.699	1	<b>&lt;.001</b>	.354	.200	.626
Months of mentoring experience		.005	.0025	.000	.010	4.047	1	<b>.044</b>	1.005	1.000	1.010
Mentor gender		.030	.2225	-.406	.466	.018	1	.893	1.030	.666	1.593
(Scale)		1 <sup>b</sup>									

a. Set to zero because this parameter is redundant; b. Fixed at the displayed value.

**Table B.14: Parameter estimates ordinal regression – Dependent Variable: Outcome Protective**

		B	Std. Error	95% Wald CI		Hypothesis Test			Exp(B)	95% Wald CI for Exp(B)	
				Lower	Upper	Wald Chi-Square	df	Sig.		Lower	Upper
Threshold	[Protective=1]	-3.170	.6587	-4.461	-1.879	23.160	1	<.001	.042	.012	.153
	[Protective=2]	-2.270	.5842	-3.416	-1.125	15.101	1	<.001	.103	.033	.325
	[Protective=3]	-2.066	.5831	-3.209	-.923	12.553	1	<.001	.127	.040	.397
	[Protective=4]	-1.073	.5687	-2.187	.042	3.557	1	.059	.342	.112	1.043
	[Protective=5]	-.391	.5608	-1.490	.708	.487	1	.485	.676	.225	2.030
	[Protective=6]	.890	.5616	-.211	1.991	2.511	1	.113	2.435	.810	7.320
[Mentor age group=1]		1,785	.7174	.379	3.191	6.193	1	<b>.013</b>	5.961	1.461	24.320
[Mentor age group=2]		1,052	.5526	-.031	2.135	3.622	1	.057	2.862	.969	8.454
[Mentor age group=3]		.771	.3807	.025	1.517	4.105	1	<b>.043</b>	2.163	1.026	4.561
[Mentor age group=4]		.344	.2805	-.206	.893	1.500	1	.221	1.410	.814	2.443
[Mentor age group=5]		0 <sup>a</sup>	.	.	.	.	.	.	1	.	.
Country		-.266	.2702	-.796	.263	.970	1	.325	.766	.451	1.301
Months of mentoring experience		.004	.0023	-.001	.008	2.735	1	<b>.098</b>	1.004	.999	1.008
Mentor gender		-.442	.2201	-.874	-.011	4.032	1	<b>.045</b>	.643	.417	.989
(Scale)		1 <sup>b</sup>									

a. Set to zero because this parameter is redundant; b. Fixed at the displayed value.

**Table B.15: Parameter estimates multinomial regression – Dependent Variable: Ongoing support (SU only)<sup>58</sup>**

		B	Std. Error	Wald	df	Sig.	Exp(B)	95% CI for Exp(B)	
								Lower Bound	Upper Bound
“ Somewhat satisfied”	Intercept	-17.109	6.168	7.695	1	.006			
	Mentor gender	3.759	1.176	10.221	1	<b>.001</b>	42.895	4.282	429.705
	Mentor age group	2.522	1.058	5.682	1	<b>.017</b>	12.459	1.566	99.143
	[First-year mentors SU]	.397	1.118	.126	1	.723	1.487	.166	13.296
	[More experienced mentors SU]	0 <sup>a</sup>	.	.	0	.	.	.	.
“ Satisfied”	Intercept	-4.630	4.997	.859	1	.354			
	Mentor gender	2.281	1.078	4.474	1	<b>.034</b>	9.784	1.182	80.965
	Mentor age group	.596	.901	.438	1	.508	1.816	.310	10.624
	[First-year mentors SU]	-2.775	1.402	3.918	1	<b>.048</b>	.062	.004	.973
	[More experienced mentors SU]	0 <sup>a</sup>	.	.	0	.	.	.	.
“ Very satisfied”	Intercept	-.850	4.412	.037	1	.847			
	Mentor gender	1.006	1.036	.944	1	.331	2.736	.359	20.829
	Mentor age group	.129	.788	.027	1	.870	1.137	.243	5.325
	[First-year mentors SU]	-.918	1.004	.836	1	.361	.399	.056	2.858
	[More experienced mentors SU]	0 <sup>a</sup>	.	.	0	.	.	.	.

a. This parameter is set to zero because it is redundant.

<sup>58</sup> The reference category is: “Scarcely satisfied”. The model shows a good fit [ $\chi^2$  (9, N = 64) = 31.829, p < .001].

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## Appendix C

### Metaphors and definitions of the mentor role/experience

Table C.1 – Symbols and metaphors used by mentors

Focus	Category	Interviewee	Country	Age	Symbol	Meaning
Volunteer	MENTOR ROLE	Albert	S	65+	Song “Climb Ev'ry Mountain”	Encouraging/inspiring
		Sally	S	56-64	Song “Three little birds”	Reassuring/cheering up
		Pam	I	65+	Song “La cura”	Looking after/giving attention
	MENTOR GROWTH/ EXPERIENCE	Neil	S	56-64	Sadness and frustration	Experiencing difficulties
		Rupert	I	65+	Mentee cheating at cards	
		Bernie	S	35-40	Feather	Process of attunement
		Sara	I	65+	Clown	
Volunteer / Pair	MR	Sara	I	65+	Daisy	Ups and downs of the journey
		Patrick	S	41-55	Book	
		Edwin	S	41-55	Onion	MR iterative discovery process
Pair	MR	Cindy	I	56-64	Stone thrown into water	MR transformative power
		Phoebe	S	41-55	Rainbow	MR life course
		Amanda	I	41-55	Colored pinwheel	MR richness
		Jane	I	65+	Two hands shaking	MR reciprocity

	<b>THE “ACT OF BONDING”</b>	Celine	S	<35	To-do list	Becoming friends/sharing/being thanked
		Anne	I	56-64	The “coffee ceremony”	
		Eloise	S	<35	Handmade woolen pom-pom	Overcoming some issues
		Giselle	S	41-55	Coloring book	
<b>Mentee</b>	<b>MENTEE GROWTH/ EXPERIENCE</b>	Diane	S	56-64	Dove	Something delicate, meant to fly away or flourish
		Vivian	S	65+	Seed planted	
		Lily	I	65+	Butterfly	

**Table C.2 – Definitions provided by mentors**

	Category		Interviewee	Country	Age	Examples – A mentor is someone who:
<b>SUPPORT</b>	<b>EMOTIONAL</b>	<b>FIRENDSHIP/ (TRAVEL) COMPANIONSHIP</b>	Edwin	S	41-55	... wants to establish a friendship and be on an equal footing with them, so that both – the mentor and the mentee – are willing to open up and meet halfway. [Jane]
			Amanda	I	41-55	
			Cindy	I	56-64	
			Rupert	I	65+	
			Pam	I	65+	
			Jane	I	65+	
		<b>LISTENING</b>	Celine	S	<35	... listens to them talking about what's going on in their lives. A pair of ears. [Celine]
			Eloise	S	<35	
			Phoebe	S	41-55	
			Diane	S	56-64	
			Sally	S	56-64	
	Neil		S	56-64		
	<b>INSTRUM.</b>	<b>DOING</b>	Albert	S	65+	... supports them through actions and small, yet tangible, gestures.

<b>SELF-EMPOWERMENT/ SELF-COMPETENCE</b>	Bernie	S	35-40	... can truly help them to want to help themselves and enjoy a better life, drawing out their talents and becoming happier, more satisfied. [Bernie]
	Patrick	S	41-55	
<b>ROLE MODELING/ GUIDANCE/ DIRECTION</b>	Giselle	S	41-55	... can offer a viewpoint on reality different from their everyday life, at school as well as at home. Someone who brings experiences that maybe they do not normally have; who, through stories, leads them to discover different dimensions. [Amanda]
	Vivian	S	65+	
	Amanda	I	41-55	
	Anne	I	56-64	
<b>SUBTRACTION/ EXPRESSION OF PERSONALITY</b>	Sara	I	65+	... should ask him/herself: 'What can I learn? How can I adapt? What tools can use? How can I serve the cause?', rather than: 'What can I do/say/teach?'.
	Lily	I	65+	... someone who finds it natural to be a mentor, who likes to welcome people, to hug. Someone who <i>is</i> just like that.

## Appendices Chapter 6

### Appendix A

#### Semi-structured Interview Guide

##### a. Conceptualization of the spread process

*Objective: exploring interviewees' interpretation/view of the process*

1. How do you interpret the spread process initiated by [organization]? In your opinion, which are its ultimate intended objectives and the principles/vision that inspire this process?
2. Has this perception/view changed over time? In what way?
3. Where does the innovativeness of this program lie compared to other existing practices and what are the implications of this for the scale-up process?
4. In what ways, if any, would you say that spreading a program such as [program] differs from disseminating a business model or product or other social interventions that come to your mind?
5. In general, what are, in your opinion, indicators of successful spreading processes?

##### b. The [organization]'s spread process in the country

*Objective: understanding how the organization went through this process so far*

6. What was the pace and scope of the expansion to new implementation sites? Which, instead, the expectations or plans for the future?
7. In broad terms, which have been the channels and relationships crucial to get to a wider adoption of the program?
8. Can you describe how the [program]'s spread was operationalized so far?
  - i. (PROBE) To what extent did a strategic approach and planning underpin the process? Please, describe how this has happened and whether/how this enhanced program's scalability.
  - ii. (PROBE) In what way, if any, would you say that the [organization]'s intervention model and its spread contributed to systems strengthening so far? And in the future?

**c. A closer look at factors/actors affecting the spread process**

*Objective: identifying factors and actors positively/negatively affecting the process*

9. Are there any internal/organizational factors that have influenced the spread of this program? Please describe.
- i. (PROBE) How have program leaders played a role?
  - ii. (PROBE) How has the recognition of the organization at the community and institutional level played a role?
  - iii. (PROBE) To what extent has (or would) the evidence documenting the impacts and success of the program support(ed) its spread?
  - iv. (PROBE) What internal resources (whether financial, human or of different nature) turned out to be crucial to sustain a larger-scale implementation of the program?
  - v. (PROBE) Is there anything else pertaining to the organizational setting that could have facilitated the process or could do so prospectively?  
What?
10. Are there any external/environmental factors that have influenced the spread of this program? Please describe.
- PUBLIC AWARENESS AND CULTURAL VALUES:
- i. (PROBE) What is the need or social issue the program seeks to address?
  - ii. (PROBE) How strongly is the need for tackling this issue felt at the societal level in [country]? What role did this play in promoting program spread?
  - iii. (PROBE) To what extent is mentoring, as an intervention model, established, endorsed and accepted at the societal level and in cultural terms?
  - iv. (PROBE) Do you think enough awareness has been generated around this social issue and this specific intervention model as a way to tackle it?
  - v. (PROBE) If not, what do you think is needed to increase visibility and create greater awareness?
  - vi. (PROBE) How has [organization] helped/could help to make this happen?

BROAD POLICY CONTEXT:

- vii. (PROBE) Have the political environment and policy-makers played any role?
  - viii. (PROBE) Would you say that this intervention model is adequately endorsed by country's key policy priorities, norms and guidelines? If not, why?
  - ix. (PROBE) What policy, legal, institutional or system changes are needed to build support for increasingly scaling up the program and achieve a wider adoption?
11. Who has been involved in the implementation or promotion of the expansion process? How did they get to be recruited and involved?

THE ROLE OF IMPLEMENTERS (OR ADOPTERS)<sup>59</sup>:

12. Which are the actors involved in adopting and implementing the program and what has been their participation/role in this process?
13. Which have been the key assets to leverage or shortages/obstacles to overcome in order to spur capacity building from the side of adopters?
14. In general, have implementers (or adopters) kept intact the intervention's essential constitutive elements (e.g., organizational vision/mission/values; routine implementation practices, etc.) while introducing the model in the specific implementation context? Or conversely, were adaptations needed and made as the program was introduced into new sites?
15. If yes, in which ways had the model been adapted (e.g., streamlined/simplified)? Why were these adaptations needed and what results did they produce?
- i. (PROBE) What role do mentors and their attitude towards the intervention's constitutive elements play in this process?
  - ii. (PROBE) In the framework of the ongoing program spread across the country, which are the key conditions to ensure that the same level of

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<sup>59</sup> Individuals, teams or organizations other than the "innovator" (who developed the idea for the intervention or first implemented it within a certain context) that implement the intervention in a different site or setting to the one in which it was originally developed.



success in recruiting and retaining volunteers is achieved in cities other than [first implementation city]?

- iii. (PROBE) Which are, instead, the main envisaged risks or challenges when it comes to recruit and retain growing numbers of mentors?
- iv. (PROBE) How should [organization] cope with them?
- v. (PROBE) In regards to the provision of this intervention model in **schools** other than those located in [first implementation city], to what extent has the model been integrated in their service offerings? Why?
- vi. (PROBE) What role do their attitude towards the intervention's constitutive elements play in this process?
- vii. (PROBE) Did this process of integration/introduction meet significant difficulties? Which ones?
- viii. (PROBE) Which are the most critical steps to accomplish or challenges to meet in order to achieve a full integration and a further enlargement of the program's reach?
- ix. (PROBE) What can [organization] do to meet these challenges?

#### **THE ROLE OF CHAMPIONS:**

16. Which are the actors that **promote and facilitate** the process and what has been their participation in this process?

- i. (PROBE) In regards to the provision of this intervention model in **local authorities** other than [first implementation city], to what extent has the model been integrated in their policy priorities and service offerings? Why?
- ii. (PROBE) What role do their attitude towards the intervention's constitutive elements play in this process?
- iii. (PROBE) Did this process of integration/introduction meet significant difficulties? Which ones?

