

Checklist of Program Progress: PROGRAM OPERATIONS

As you work to ensure strong, everyday operations for your program, as outlined in the *Elements of Effective Practice*, use the checklist below to gauge your progress. Checking off the items on this list indicates that you are putting the proper components in place to grow a quality, sustainable program.

If your program is already well established, you can use the checklist to gauge the soundness of your current policies, procedures, and organizational structure.

Note: The design, focus and structure of your program may mean that some of these components will not be applicable or will need to be modified to match your specific program structure.

1. Recruit Mentors, Mentees and Other Volunteers

A written recruitment plan with multiple strategies

- Our program has a written recruitment plan, which includes:
 - Goals for recruitment;
 - Potential sources of types of volunteers most appropriate for our youth population;
 - A timeline of scheduled activities;
 - Designation of program staff responsible for recruitment activities; and
 - Budget for recruitment efforts.
- Our program tailors its recruitment pitch to target specific audiences.
- We have written job descriptions that are used in our recruitment efforts to define eligibility for participants, including mentors, mentees and parents/caregivers.

- Recruitment materials describe the level of commitment involved (e.g., frequency, longevity).
- Our program makes it a priority to integrate our community partnerships and connections into our recruitment efforts.
- We conduct awareness and information sessions for potential mentors.
- Our recruitment plan is regularly reviewed and revised.

2. Screen Potential Mentors and Mentees

Established mentor/mentee intake procedures

- Our program has a step-by-step written intake procedure for both volunteers and youth.
- Copies of these procedures are kept in our program's policy and procedure manual.
- The steps of the procedures are clearly explained to volunteers and youth at several points.
- We have an established tracking system for volunteers and youth as they move through the steps of the intake procedures.
- Our procedures are effective for both customer service and risk management.
- Our intake procedures are regularly reviewed and revised as needed.

Appropriate mentor screening procedures

- Our program has a step-by step written screening procedure.
- Our program has developed a mentor job description that acts as an initial screening tool.

- Our minimum screening requirements are:
 - Written application with a release statement agreeing to a background check, an agreement to abide by program rules and a statement discharging the program from liability and claims;
 - Reference checks (two to three non-family personal or work references);
 - Face-to-face interview;
 - Criminal background check and checks of available sexual offender and child abuse registries; and
 - Other checks as appropriate (e.g., a motor vehicle license check if the program is community based; a home site visit if the program is community based).
- We have a formal, written interview process with standard questions.
- We keep all applications and screening results on file.
- Our screening process also looks at the non-criminal factors that may render an applicant ineligible or inappropriate for our program.
- We have a written list of disqualifying offenses and mitigating circumstances that mirrors our eligibility policies.

3. Orient and Train Mentors, Mentees and Parents/Caregivers

Initial orientation for prospective mentors and mentees

- Our program provides an initial orientation for prospective mentors and mentees.
- Our initial orientation covers the program's history, mission and positive outcomes.
- Our orientation also covers eligibility, roles, responsibilities and expectations of participating in the program.

- Our orientation includes program policies and practices, including expectations of mentors, confidentiality and liability information.
- We ensure that mentors, mentees and parents/caregivers understand program policy regarding their meeting outside of the program.
- Our orientation “sells” who we are and what we do.
- We track who participates in orientations and have a written procedure for following up with participants.
- We have pre-match training for all new mentors and mentees.
- Our program has a written training curriculum for both mentors and mentees.
- Our curriculum addresses the following topics:
 - Program history, mission and goals;
 - Program policies and procedures;
 - Mentor and mentee roles;
 - Strategies for beginning the match;
 - Communication skills;
 - Diversity issues;
 - Youth development;
 - How to handle a variety of situations;
 - Crisis management;
 - Networks of support;
 - Child abuse reporting; and
 - Other topics needed for our specific program.
- We have post-training evaluations on file for each mentor and mentee.
- We are able to bring in experts from our community to provide expertise on particular training topics.

4. Match Mentors and Mentees

Established matching procedure

- Our program has a step-by-step written matching procedure that is followed by all staff members who are making matches.
- We have developed pre-established matching criteria.
- Each mentor and mentee in our program has a comprehensive file that includes their application, reference checks, interview responses and other information that will assist staff in making an appropriate match.
- Our matching procedure puts the needs of the youth first.
- Our program gives a voice to the parent in the matching process.
- Our program arranges an introduction between mentors and mentees.
- Our initial meeting between matches is structured, with clear goals and objectives.
- We ensure that mentors, mentees and parents/caregivers understand and agree to the terms and conditions of program participation.
- We have developed contingency plans for failed matches.

5. Bring Mentors and Mentees Together for Mentoring Sessions That Fall Within the Program Parameters

- We provide safe locations and circumstances for pairs to meet.
- Our program provides mentors with resources and materials for activities.
- Our mentoring activities are based on the mentees' needs and are fun for the mentees.

6. Provide Ongoing Support, Supervision, and Monitoring of Mentoring Relationships

Established procedure for monitoring matches

- Our program has a step-by-step written procedure for monitoring matches.
- Our program's procedure has a set schedule of when program participants should be contacted.
- We communicate regularly with program participants and offer support.
- Our program has developed appropriate tracking tools and a list of questions to ask during check-ins.
- We have identified staff members who are responsible for monitoring matches and have provided them with any training they may need.
- Program staff members are aware of other community resources and support systems that can help with problems outside the scope of our program.
- Our program has an accessible record-keeping system that keeps track of the progress of the match and ensures that appropriate documentation is done on a regular basis.
- We help mentors and mentees define next steps for achieving mentee goals.
- Our program has a procedure in place for managing grievances, resolving issues and offering positive feedback that are revealed throughout the monitoring process.

Support, ongoing training, and recognition for volunteers

- We make it easy for mentors to contact and get help from staff.
- Our program offers frequent ongoing training opportunities for our mentors and mentees.
- We ask mentors what additional support and training they need.

- Our program uses feedback from volunteers and youth to determine the content and scope of ongoing training activities.
- Participants in training sessions fill out evaluations that are kept on file and used to improve the program's training efforts.
- Our program provides mentors with resources, staff involvement and other types of personalized support on a case-by-case basis.
- We give mentors information about situations requiring staff notification (e.g., indications of child abuse, suicidality).
- Mentors can participate in a facilitated support group or other support systems to share ideas and receive support.

7. Recognize the Contribution of All Program Participants

- We recognize mentors, mentees, other participants, funders and organizations that sponsor or contribute to the mentoring program.
- Our program regularly recognizes and thanks mentors in a variety of meaningful ways.
- We sponsor recognition events.
- We make the community aware of the contributions made by mentors, mentees, supporters and funders.
- We actively solicit feedback from mentors and mentees regarding their experiences and use the information to refine the program and retain mentors.

8. Help Mentors and Mentees Reach Closure

Established match closure procedure

- We have defined procedures for handling both unexpected and planned terminations.
- Our program has step-by-step written procedures for deciding when to terminate a problematic match.
- Our program has written closure procedures that factor in the many different reasons why a match may end.
- We conduct private, confidential interviews with mentees and mentors.
- Our procedure provides support and assistance to the youth, the volunteer and parents/caregivers.
- Staff is trained to recognize and respond to indicators that the young person is being adversely affected by the termination.
- Our program ensures that mentors, mentees, and parents/caregivers understand program policy regarding their meeting outside the program. This policy is outlined in a written contract that is signed by all parties at the time of closure.

Adapted from *Checklist of Program Progress*, Oregon Mentors, *Youth Mentoring: A Primer for Funders*, The Connecticut Mentoring Partnership and *Elements of Effective Practice*, second edition, MENTOR/National Mentoring Partnership.