

How to Develop An Operations Manual For Your Mentoring Program

By Jerry Sherk, M.A.

For:
The EMT Group

Table of Contents

Development of an Operations Manual..... 1

Here's how to begin the development of your operations manual..... 1

Brief Descriptions of the Ten Recommended Best Practices for Mentor Programs..... 2

 Statement of Purpose and a Long Range Plan..... 3

 Recruitment Plan..... 4

 Orientation 5

 Screening..... 6

 Training Curriculum 7

 Matching Strategy 8

 Monitoring Process 9

 Support, Recognition and Retention Component..... 10

 Closure 11

 Evaluation 12

Development of an Operations Manual

The Operations Manual is based on the ten Recommended Best Practices for Mentor Programs (QAS) for Youth Mentoring Programs. Experienced program managers understand that the Recommended Best Practices for Mentor Programs are vital in creating safe and effective programs. Essentially a framework for best practices, these standards are also recognized as a valuable tool for promoting mentee safety and personal growth.

When first learning how to develop a mentoring program, it takes new program managers a long time to understand how utilize the standards. It's our belief that their use can be simplified if program managers develop an operations manual as described below.

Remember, the primary uses of an operations manual are A) to develop strategies to be used in running the mentoring program, and B) to chronicle the development of operational procedures so that they can be passed on to subsequent program staff.

Here's how to begin the development of your operations manual:

- Purchase a 1 1/2 to 3 inch plastic three-ringed-binder from your office supply store.
- Purchase a set of 15 (or more) subject dividers.
- On the first 10 dividers, put the name of each of the QAS standards starting with "Statement of Purpose and Long Range Plan."
- Print a brief description of each of the standards (as given below) on the first page of each QAS section as a reminder of what the program is about.
- Throughout the program, chronicle any developments, timelines, plans, successes or failures, etc. in their respective categories.

With the additional dividers, you can consider the following additional headings:

RISK MANAGEMENT: Make a separate heading Risk Management, and put the "QAS Risk Management Matrix" in its entirety into this section. Follow the instructions in part ?? of this training that describe utilization of this tool

Narrative: This section can serve as a journal for the program. Whose idea was it to start the program? What personnel were on the original design team? Where did the funding come from? What were some of the early successes and failures? Subsequent program staff can benefit greatly from this information.

Recommended Best Practices for Mentor Programs: Obtain a copy of the Recommended Best Practices for Mentor Programs in their entirety and place in this section. Sometimes it's good just to read through the standards to see if anything jumps out at you (that you may need to improve on).

Forms: Place program forms, letters, sign-off sheets, etc. in this section and periodically assess for possible updating.

Brief Descriptions of the Ten Recommended Best Practices for Mentor Programs

As previously noted, paste each descriptor on the first page of each subject heading in your operations manual. Then throughout the life of your program, place any materials, strategies, etc, which pertain to a particular standard in the appropriate divider. (There are longer descriptions available if you wish to place them here.)

1. A **Statement of Purpose and a Long Range Plan** that includes:

- Who, what, where, when, why and how activities will be performed.
- Input from originators, staff, funders, potential volunteers, and participants.
- Assessment of community need.
- Goals, objectives and timelines for all aspects of the program.
- Funding and resources development plan.

Statement of Purpose and Long Range Plan is the guide that steers your program. This plan begins with “mission statement” and “goals and objectives” and includes who will be mentored, how many, where, how often, by whom. Many aspects of this plan will be integrated into the mentor training manual, as well as other program materials.

2. A **Recruitment Plan** for both mentors and mentees that includes:

- Strategies that portray accurate expectations and benefits.
- Year round marketing and public relations.
- Targeted outreach based on participant's needs.
- Volunteer opportunities beyond mentoring (i.e., event organization, office support, etc.)
- A basis in your program's statement of purpose and long-range plan.

A year-round **Recruitment Plan** is necessary to tap into resources such as service clubs, schools, corporations, businesses, and professional organizations to find mentors. This plan includes the development of key phrases, speeches, brochures, flyers, public service announcements, and media campaigns that accurately depict your program.

3. An **Orientation** for mentors and mentees that includes:

- Program overview.
- Description of eligibility, screening process, and suitability requirements.
- Level of commitment expected (time, energy, and flexibility).
- Expectations and restrictions (accountability).
- Benefits and rewards they can expect.
- A separate focus for potential mentors and participants.
- A summary of program policies, including written reports, interviews, evaluation, and reimbursement.

The **Orientation** clarifies roles, responsibilities and expectations of mentors, youth, their families, the mentoring program, and the school (if they are a partner). The orientation is a way of describing the program in detail, including the commitments and the terms of participation in the program. After the program manager lets everyone know what the program is about, they then ask the participants, “are you still interested?” Note that the mentor orientation is usually much shorter than the initial basic mentor training.

4. Eligibility **Screening** for mentors and mentees that includes:

Adult Mentors

- An application process and review.
- Face-to-face interview.
- Reference checks for mentors which must include criminal history record checks (finger printing), and may include character references, child abuse registry check, and driving record checks.
- Suitability criteria that relate to the program statement of purpose and needs of the target population. Could include some or all of the following: personality profile; skills identification; gender; age; language and racial requirements; level of education; career interests; motivation for volunteering; and academic standing.
- Successful completion of pre-match training and orientation.

Youth Mentors

- An application process which must include a parental consent form.
- Face-to-face interview.
- Reference checks of at least two personal non-related adults.
- Successful completion of a pre-match training and orientation.

Screening sets the standards of who is eligible for the mentoring program. Safe programs set eligibility requirements and conduct fingerprint and background checks through the California's Department of Justice (or through the FBI if the mentor candidate has been in the area for less than two years). This process weeds out persons with felonies and other crimes which indicate the person would present a high risk for youth. Mentees are screened by making sure they meet the eligibility criterion set by the program.

5. A readiness and **Training Curriculum** for all mentors and mentees that includes:

- Trained staff trainers.
- Orientation to program and resource network, including information and referral, other supportive services, and schools.
- Skills development as appropriate.
- Cultural/heritage sensitivity and appreciation training.
- Guidelines for participants on how to get the most out of the mentoring relationship.
- Do's and don'ts of relationship management.
- Job and role descriptions.
- Confidentiality and liability information.
- Crisis management/problem solving resources.
- Communication skills development.
- Ongoing sessions as necessary.

Training Curriculum: During the initial basic training, mentors learn more fully the requirements, policies and procedures of the program. In addition, mentors are trained on how to build a positive relationship with their mentee. Subject matter can include “proper mentor attitude and expectations, communication skills, diversity issues, child and adolescent development, confidentiality, child abuse reporting, goal setting, academic tutoring, etc.” These and other subjects will be covered during “on-going” trainings also. Ongoing trainings can take a number of forms such as round table discussions and support groups, or even guest presentations.

The mentees' training is typically shorter than the mentors', as it mainly focuses on program procedures, the process of building a stable relationship with an adult, as well as how to get the most out of the mentoring relationship.

6. A **Matching Strategy** that includes:

- A link with the program's statement of purpose.
- A commitment to consistency and accountability
- Appropriate criteria for matches, including some or all of the following: skills identification; career interest; gender; age; level of education; motivation for volunteering; and standing within the organization ; life experience; temperament
- A signed statement of understanding that both parties agree to the conditions of the match and the mentoring relationship

Matching Strategy: Each program needs a plan for matching mentors and mentees. Programs should consider not only chemistry, but also interests and other elements, such as race and ethnicity, language, hobbies, etc. Expertise of mentors and difficulty the mentoring task also comes into play, as well as time availability of mentor and mentee.

7. A **Monitoring Process** that includes:

- Consistent, scheduled meetings with staff, mentors, and participants
- A tracking system for ongoing assessment
- Written records and filing system
- Input from community partners, family, and significant others.
- A process for managing grievances, praise, re-matching, interpersonal problem solving, and premature relationship closure.

Monitoring the process of making sure the match is going okay. It is important to find out if the match is still meeting, program rules are being followed, and that everyone is relatively happy. Monitoring can also track the progress of the mentees' function in such areas as school attendance, grades, referrals, general mood, etc.

Having mentors and mentees fill out program logs after each meeting is a central part of the monitoring process. Research shows that matches that are monitored are last longer and are much more successful than those that are not carefully monitored.

The monitoring process includes defining the rules for problem solving, early termination, as well the rematching of participants should a relationship end early.

8. A **Support, Recognition and Retention Component** that may include:

- A formal kick-off event.
- Ongoing peer support groups for volunteers, participants, and others.
- Ongoing training and development.
- Relevant issue discussion and information dissemination.
- Networking with appropriate organizations.
- Social gatherings of different groups as needed.
- Annual recognition and appreciation event.
- Newsletters or other mailings to mentors, mentees, supporters, and funders.

Note: Support, Recognition, Retention is the only three-part standard.

Support means that each participant has a support system that they can rely on during the program. Support can mean assistance from the program manager and from peers. Periodic “ongoing trainings” and “group supervisions” are also essential in the support of program participants.

Recognition is a way of rewarding mentors and mentees for their involvement. Many programs enlist celebrations and awards of a way of saying thanks.

A **Retention** plan is important so that programs will have continuing participation of mentors and mentees. A retention plan focuses on celebrations, awards, and positive communication with program participants and with parents.

9. **Closure** steps that include:

- Private and confidential exit interviews to de-brief the mentoring relationship between:
- Mentee and staff
- Mentor and staff
- Mentor and mentee without staff
- Clearly stated policy for future contacts between mentor and mentee.
- Assistance for participating in defining next steps for achieving personal goals (for the mentee).

Closure: This is an element that is usually very brief in its development and implementation, but is very important. "Closure" means that the program has a strategy for letting participants (especially the mentees) know the length of the mentoring relationship, so that there won't be hard feelings upon termination. Improper closure could make the mentees experience feelings of abandonment and betrayal. Closure also gives program participants the opportunity to discuss with staff how they felt about the support (or non-support) from staff and the program in general. Finally, a sound closure policy also clarifies any future contact between mentors and mentees. To reduce program liability, send certified letters with return receipt requested, to document that mentors and parents have received notification that the match will no longer be supervised by the program.

10. An **Evaluation** process based on:

- Outcome analysis of program and relationship.
- Program criteria and statement of purpose.
- Information needs of board, funders, community partners, and other supporters of the program.

The **Evaluation** is the report card for the program. How many youths were mentored by how many adults, and for how long? What costs were incurred? What was the experience of the mentor and mentee? What changes (if any) occurred in the mentee? Did they receive higher grades and testing scores? Less referrals? How did mentoring effect their social skills? Evaluations can include "self-evaluations" or more complex tools such as a "matrix model." Staff should allow mentors and mentees to evaluate the program as well as the trainings. Often called "satisfaction surveys, these evaluations are used to determine if the program is working and also to assess the need for changes and improvements.