

Guide for Standard Three – Eligibility Screening

Policy 3.1 Screening process

- It shall be the policy of this agency to implement a screening process for mentors and mentees

Policy 3.1.1 Mentee screening process

- The following processes must be completed to determine if a mentee applicant qualifies to become a mentee
- A Mentee File must be created for all prospective mentees who return a completed **Mentee Application**
- A Mentee File shall contain but not limited to the following documentation:
 - File Ledger
 - File Review and Access Documentation Form
 - Mentee Application
 - Parent/Guardian Permission
 - Face to Face Interview Notes
 - Eligibility Criteria Checklist
 - Mentee Agreement
 - Match Agreement and Contract
 - Match Supervision and Documentation
 - Mentee and Parent/Guardian Mentoring Program Orientation
 - Individual Growth Plan and Progress
 - Mentor Match Evaluations and Surveys
 - Match Closure and Documentation
 - Exit Interview

Policy 3.1.1.1 Mentee Application

- The mentee applicant must submit a **Mentee Application** and **Mentee Interest Survey** to the Mentoring Program and the **Mentee Application** must be maintained in a Mentee File

Policy 3.1.1.2 Parent/Guardian Permission

- The mentee applicant's parent/guardian must submit Parent/Guardian Permission (may be a part of the **Mentee Application**) for the youth to become a mentee and the Parent/Guardian Permission must be maintained in a Mentee File

Policy 3.1.1.3 Face to Face Interview

- Mentoring program staff must schedule and facilitate a Face to Face Interview with the Mentee Applicant within 5 days of submitting an application

Policy 3.1.1.4 Eligibility Criteria Checklist

- Mentoring program staff must document applicant's eligibility via an **Eligibility Criteria Checklist (Mentee Application and Orientation Checklist)**

Policy 3.1.2 Mentor Screening Process

- The mentor screening procedure must be completed to determine if a mentor applicant qualifies to become a mentor

- A Mentor File must be created for all prospective mentors who return a completed **Mentor Application**
- A Mentor File shall contain but not limited to the following documentation:
 - File Ledger
 - File Review and Access Documentation Form
 - Mentor Application
 - Face to Face Interview Notes
 - Eligibility Criteria Checklist
 - Background Check
 - Reference Checks (of at least references)
 - TB Test Results
 - Match Agreement
 - Match Supervision and Documentation
 - Mentoring Program Orientation and Training Records and Documentation
 - On-going Training Records
 - Performance Plans
 - Match Evaluations and Surveys
 - Match Closure and Documentation
 - Exit Interview
 - Parental Consent Form (peer mentors)

Policy 3.1.2.1 Mentor Application

- The mentor applicant must submit a **Mentor Application** to the Mentoring Program and the **Mentor Application** must be maintained in a Mentor File

Policy 3.1.2.2 Face to Face Interview

- Mentoring program staff must schedule and facilitate a Face to Face Interview with the Mentor Applicant within 30 days of submitting an application

Policy 3.1.2.3 Eligibility Criteria Checklist

- Mentoring program staff must document applicant's eligibility via an **Eligibility Criteria Checklist (Mentor Application Checklist)**

Policy 3.2 Required Forms and Documentation

It shall be the policy of this agency that the following forms and documents are utilized and managed to ensure appropriate compliance to Standard 3: Eligibility Screening

- **Mentor File Ledger**
- **Mentee File Ledger**
- **File Review and Access Documentation**
- **Mentee Application**
 - **Parent/Guardian Permission**
- **Mentee Interest Survey**
- **Mentor Application**
- **Mentee Face to Face Interview Questionnaire**
- **Mentor Interview Guide**
- **Mentee Eligibility Screening Checklist (Mentee Application and Orientation Checklist)**
- **Mentor Eligibility Screening Checklist (Mentor Application Checklist)**
- **Mentor Background Check**
- **Mentor Reference Checks Form/Questionnaire**
- **Mentor Evaluation and Training Guide**
- **Match Agreement Contract**

- Match Supervision Form
- Mentee Application and Orientation Checklist
- Mentor Application Checklist
- Match Evaluations and Surveys
- Match Closure Form
- Exit Interview
- Parental Consent Form (peer mentors)
- Individual Growth Plan

Screening Procedure

State procedure the mentoring program will follow to ensure the above stated policies and use of forms and documentation

Example Procedure

Mentor Screening Procedure

In accordance with this agency's eligibility and screening policies, mentoring program staff should complete the steps below to determine if a candidate qualifies to become a mentor.

1. The applicants must return all completed materials in the application packet given to them during the inquiry process
2. A mentor file should be created for all prospective mentors who return a completed application. A Mentor Contact Sheet should be kept on top of one side of each file. The file should also contain the Mentor Application Checklist followed by all other application materials and interview notes. As each component of the screening process is completed, update the checklist on the Mentor Application Checklist
3. The Director / Management Staff members should:
 - Make an appointment and conduct an in-person interview with the prospective mentor.
 - Conduct phone interviews on at least two personal references.
 - Process the driving record, criminal history, child abuse registry, *and* sexual offender registry checks
4. Based on all information gathered above, complete the volunteer assessment and make a determination as to the appropriateness of the participant's involvement in the program.
5. Send out an acceptance or rejection letter to the applicant based on the overall assessment of appropriateness.
6. If applicant is rejected, the applicant's file should be placed into the file area of ineligible applicants in the Human Resources Department.
7. If the applicant is accepted, the mentor must complete the initial two-hour training session prior to being involved with a mentee / group.

Mentee Screening Procedure

In accordance with this agency's eligibility and screening policies, program staff should complete the steps below to determine if a candidate qualifies to become a mentee.

1. Upon receiving a referral for any youth, program staff must begin the process by setting and initial appointment / tour with the Parent/Guardian or referring agency.
2. The applicant must return all completed materials in the application packet given to them during the inquiry process and Mentee Interest Survey.
3. A mentee file should be created for all prospective mentees who return a completed application. A Mentee Contact Sheet should be kept on top of one side of each file. The file should also contain the Mentee Application and Orientation Checklist followed by all other application materials and interview notes. As each component of the screening process is completed, update the checklist on the Mentee Assessment Summary.
4. Based on all information gathered above, complete the Mentee Assessment Summary and make a final determination as to the appropriateness of the participant's involvement in the program.
5. The Director / Management Staff can offer an acceptance or rejection to the mentee or parent/guardian or agency based on the overall assessment of appropriateness.
6. If applicant is rejected, the applicant's file should be placed into the file area of ineligible applicants in the Human Resources Department.
7. If the applicant is accepted a beginning date will be set and general behavioral guideline rules will be covered with mentee and parent/guardian or agency.