



Striving for excellence in service delivery—Big Brothers Big Sisters

National Standards

The National Standards are determined and formally approved by member agencies and reflect their commitment to deliver quality professional services to children and youth in the mentoring programs they provide.

July 2014

To ensure agency compliance with National Standards, use of this document is required as of January 1, 2015.



Big Brothers Big Sisters.ca

NATIONAL STANDARDS PREAMBLE

The National Standards are determined and formally approved by member agencies and reflect their commitment to deliver quality professional services to children and youth in the mentoring programs they provide.

The National Standards apply ONLY to the delivery of mentoring programs (see the Measuring Reach document for the definition of a mentoring program) offered to children and youth under the age of 16. Programs that do not fall within these parameters are not subject to the Standards. However, the Standards do reflect quality social work practice and as such are a good guideline for the delivery of other programs offered by your agency.

The National Standards need to be incorporated into each agency's policies and procedures' documents to ensure consistent delivery of service across Canada. In order to be covered by the Cooperators insurance package, agencies must abide by all Standards approved by the membership

Please note that provincial and federal legislation supersedes National Standards and will be monitored by the bodies designed to do so. (See Appendix A for sample policy statements and considerations)

Important definitions:

- Required (form, policy etc.)
 - The document provided is mandatory and must be used in its entirety. Statements cannot be altered or omitted, however additions are permitted.
- Sample (letter, form, policy, language etc.)
 - The document is provided as an example and its use is not required as is. Please review and adapt to your own agency's needs.
- Required language
 - The language provided is mandatory and must be used in its entirety. Statements cannot be altered or omitted, however additions are permitted (except for Appendix O, Appendix T, Appendix V and Appendix W).
- Community-Based Mentoring
 - The Big Brother Big Sister program (and program variations of it) where the majority of match activities occur at various locations in the community.
- Site-Based Mentoring
 - A program where the majority of match activities occur at a specific location in the community, usually a school, recreation centre, church, Boys' and Girls' Club, young offender facility, etc. Additionally, there is no opportunity to spend time in the volunteer's home and there is limited/no one-to-one time in the volunteer's car. A Memorandum of Understanding has been established which governs the relationship between the Big Brothers Big Sisters agency and the organization.
- Interpretations
 - The interpretations are incorporated into the National Standards document. Updates to the National Standards require a majority vote from the membership. Interpretations provide clarification and recommendations and do not require a vote from the membership. Agencies are accredited based on the National Standards not on the interpretations.

DISCLAIMER

The National Standards are developed by Big Brothers Big Sisters of Canada and its member agencies for use by Big Brothers Big Sisters of Canada in the provision of Big Brothers Big Sisters of Canada mentoring programs. They are one component of a comprehensive service delivery system by Big Brothers Big Sisters of Canada. The National Standards reflect Big Brothers Big Sisters of Canada's commitment to deliver quality professional services to children and youth in the mentoring programs they provide. The National Standards are provided for your general information and use only and are subject to change without notice. To the maximum extent permitted by law, the National Standards are provided "as is" without any representations, warranties or conditions of any kind, whether written, oral, express, implied, statutory, or collateral, including without limitation regarding accuracy, completeness, currency, or suitability for any non- Big Brothers Big Sisters of Canada purpose. Big Brothers Big Sisters of Canada assumes no obligation to provide you with updates, corrections, or supplements to the National Standards nor any support relating thereto. Your use of the National Standards is entirely at your own risk and you agree that Big Brothers Big Sisters of Canada shall not be liable to you or to any third party for any loss, injury or damage directly or indirectly caused by or relating to your use of the National Standards. You agree to indemnify, defend and hold harmless Big Brothers Big Sisters of Canada for any and all uses, including unauthorized uses, you may make of the National Standards.

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ORGANIZATIONAL MANAGEMENT STANDARDS

A. PLANNING

1. To guide decision-making, the agency has Vision and Mission Statements that are not in conflict with Big Brothers Big Sisters of Canada.
2. The agency has a current **strategic plan** that incorporates operational and financial plans.

Strategic plan - Refers to a comprehensive planning document that:

- Involved stakeholders in its development
- Directs operations and influences decision-making
- Has a specific timeline and
- Is currently in use

Agency progress is measured against the direction provided by the strategic planning document.

B. GOVERNANCE

1. The agency is:
 - a. incorporated according to the requirements in their province
 - b. a Corporate Member of Big Brothers Big Sisters of Canada.
2. The agency functions according to its approved bylaws.
3. The agency reviews and updates its bylaws, as needed.

Interpretation B3

The intent of this Standard is that the agency regularly reviews its bylaws, at least once every two years. Evidence of this Board-conducted review is documented in Board minutes. Updates and revisions to the bylaws are made as needed.

4. The Board fulfills at least the following:
 - a. approves and updates all applicable organizational policies.
 - b. ensures that the agency is funded, located within adequate facilities, staffed and equipped in a manner matched to its programs and services; and
 - c. annually approves a budget and regularly monitors revenue and expenditures.
5. Board roles and responsibilities are clearly stated, in writing. (See Appendix B for [sample job descriptions](#))

[Sample job descriptions](#) – See preamble for definition.

6. A Board development system is created which includes recruitment, orientation, training and leadership development, and evaluation.
7. Board members receive an [orientation](#) to the Agency prior to becoming Board members.

[Board Orientation](#) - A session where information is shared with Board members to provide them with an overview of the organization; its activities, programs and stakeholders; role position descriptions; the organization's approach to governance and their fiduciary responsibilities.

8. The agency has a policy addressing personal relationships between and among Board members and staff that could be perceived to compromise their judgment. (See Appendix C for [sample policy statements](#))

[Sample policy statements](#) - See preamble for definition

9. The Board of Directors has adopted a Code of Ethics which reflects the spirit of the Code of Ethics endorsed by Big Brothers Big Sisters of Canada and which particularly addresses staff relationships with clients. (See Appendix D for sample code of ethics)
10. All Board members undergo a [Criminal Records check](#) prior to their involvement on the board. Agencies must determine whether a Vulnerable Sectors check is additionally required based on the Board member's roles and responsibilities. A Vulnerable Sectors check must be completed if the board member's role is such that it places him/her in a position of authority, care or trust of a child, pursuant to the Criminal Records act.

[Criminal Records Check](#) - Where it is not possible to retain the original on file, a copy with a statement indicating that the original has been seen by a staff member, signed and dated by that staff member, is sufficient.

Interpretation B10

Eligibility to have the Vulnerable Sector Checks done is based on the position and not the organization. A community organization may provide services to vulnerable people, however, only those in paid or volunteer positions that deal directly with vulnerable people are eligible for the Vulnerable Sector Check.

11. Board members complete an annual Offence Declaration Form to update their record history with any new investigations, allegations, Criminal Code convictions, or pardons related to sexually based offences. Completed declarations will be maintained in the Board member's file. (See Appendix DD for required form)

Required form – See preamble for definition.

Interpretation B11

The intent of this Standard is that the Offence Declaration be signed no later than one year after the original Criminal Records Check was submitted to the agency and recorded as "completed" on the Screening Checklist.

12. If a Corporate Member ("the agency"):

- a. Ceases to be eligible for membership;
- b. Has its membership terminated by Big Brothers Big Sisters of Canada; or
- c. Decides to cease operations

the Member will work cooperatively with representatives of Big Brothers Big Sisters of Canada throughout the closure or status change process and specifically, and without restricting the generality of the foregoing, allow Big Brothers Big Sisters of Canada representatives to speak on its behalf to Canada Revenue Agency and all other relevant stakeholders.

C. HUMAN RESOURCE MANAGEMENT

GENERAL

1. The agency has a system whereby human resources policies are reviewed and communicated to staff on a regular basis.
2. All staff members have written job descriptions that are reviewed, updated and approved at least every five years. (See Appendix B for [sample job descriptions](#))

[Sample job descriptions](#) - See preamble for definition.

3. Agency staff attends professional development (at least once every two years) to ensure that appropriate skills and capabilities are current.
4. Human resources files are kept for all staff and are stored, at the agency's main office, in a locked cabinet. Human resources files include:
 - a. a resume
 - b. correspondence
 - c. interview assessments
 - d. reference checks
 - e. the original [criminal records report](#)
 - f. evidence of professional development training
 - g. annual performance appraisals
 - h. and any other relevant information.

[Criminal Records Check](#) - See Standard B10 for additional information.

5. All new staff members receive an orientation to the agency's policies and practices.
6. The successful completion of a [criminal record check](#) is required of all staff prior to hiring. Agencies must determine whether a Vulnerable Sectors check is additionally required based on the staff member's roles and responsibilities. A Vulnerable Sectors check must be completed if the staff member's role is such that it places him/her in a position of authority, care or trust of a child, pursuant to the Criminal Records act. The successfully completed check(s) is to be considered part of the employment contract/hiring criteria.

Interpretation C6

See Standard B10 for interpretation.

7. Staff complete an annual Offence Declaration Form to update their record history with any new investigations, allegations, Criminal Code convictions, or pardons related to sexually based offences. Completed declarations will be maintained in the employee's file. (See Appendix DD for [required form](#))

[Required form](#) – See preamble for definition.

Interpretation C7

See Standard B11 for interpretation.

EXECUTIVE DIRECTOR

8. The Board employs an **Executive Director** who leads and manages the agency.

Executive Director - This term refers to the most senior staff position at the agency.

Interpretation C8

The Big Brothers Big Sisters of Canada Human Resource Committee, in partnership with N-Vision Consulting Limited and the HR Council of Canada has created an Interview Guide for Hiring Executive Directors. This tool will assist local agency Boards with the process of identifying whether the candidate(s) possess key competencies for this position. The resource can be found on the national website.

To encourage the exploration and adoption of alternative organizational structures which address sustainability, we recognize that an agreement with another organization to provide leadership to the Big Brothers Big Sisters program or agency may meet National Standards. The contract or policy will need to be provided as assurance that the organizational structure meets the Standard.

9. The agency employs a staff who is responsible for all aspects of service delivery (Such individuals shall hereafter be referred to as **Service Delivery Staff**).

Service Delivery Staff - The term used to differentiate between Caseworkers and those with Casework responsibilities from all others who are employed by or who volunteer with the agency.

10. The agency has a written succession plan for the Executive Director position.

Interpretation C10

The purpose of a succession plan is to ensure the agency will continue to thrive in times when staff leadership changes. Effective succession plans should include the following:

- *A procedures manual for the Executive Director position.*
- *An outline of the Board of Directors responsibilities when hiring an Executive Director.*
- *An emergency succession plan to ensure that the organization is in a position to carry on without their leader*

11. The Executive Director takes Big Brothers Big Sisters of Canada-specific orientation within the first year of employment.

SERVICE DELIVERY STAFF

12. The minimum qualification requirement for **Service Delivery Staff** is the attainment of a two year post-secondary diploma in a related field (e.g. education, social or human services, child and youth work, family studies etc.). A copy of the post-secondary degree or diploma, and other supporting documentation, are retained in the employee's agency file.

Where a candidate for a Service Delivery Staff position does not meet the minimum qualification requirement as specifically written, a member agency may request a qualification equivalency assessment. Such an assessment will be carried out in the manner prescribed by a policy established by the Big Brothers Big Sisters of Canada Board of Directors. The outcome of the assessment will be shared with the member agency within two working days of receipt of the request.

Those employees hired prior to July 2, 2001 and who met the National Standards in effect prior to that date, will be grand-parented.

13. All new **Service Delivery Staff** complete the Big Brothers Big Sisters of Canada online orientation within three months of hire.

Service Delivery Staff - See Standard C9 for definition.

STUDENTS

14. Where possible, students have a [criminal records check](#).
15. Students are supervised by a qualified staff member.
16. Students share opinions and recommendations, but final decisions are made by a qualified staff member.
17. Students' supervisors sign off on all case note entries made by the students performing service delivery.
18. Interviews with volunteer applicants conducted by students are supervised to a degree commensurate with their education and experience.

[Criminal Records Check](#) - See Standard B10 for additional information.

D. FINANCIAL MANAGEMENT

1. The agency has Financial Management policies that:
 - a. Reflect generally accepted accounting practices.
 - b. Reflect the code of ethical fundraising (Reference Imagine Canada or the Association for Financial Professionals (AFP))
 - c. Meet the planning and reporting needs of the agency's governing body.
2. The agency has a fund development strategy which is reviewed annually and approved by the Board. The strategy is developed with an eye towards sustainability.

E. MARKETING AND COMMUNICATION

1. The agency has a marketing and communications plan that includes a crisis management plan. (See Appendix E for sample policy statements)

F. FACILITIES

1. The organization maintains a location/office that is external to a staff member's or board member's personal dwelling.

Interpretation F1

The intent is for the agency to build community profile, have visibility in the community, be considered a viable, professional, legitimate organization which provides high quality service, and to ensure that information is accessible and properly safeguarded.

2. The agency maintains a safe facility and accessible services.
3. The agency has space for conducting private interviews in a professional environment.

PROGAM DELIVERY STANDARDS

G. RISK MANAGEMENT

1. Staff and volunteers are aware of, and comply with, relevant child welfare legislation.
2. Appropriate procedures for **risk management** are developed and implemented.

Risk Management - For guidance through this process, please refer to Big Brothers Big Sisters of Canada's Risk Management Handbook on the private members' site under the Organizational Development menu. Samples of risk management policies can be found there as well.

3. All insurance policies of the agency are kept for 100 years after their expiration date.

HANDLING REPORTS OF UNSAFE & INAPPROPRIATE BEHAVIOUR; DISCLOSURES OF ABUSE

4. A copy of current Child Welfare legislation is on file.¹ Agency staff receive training every two years on Child Protection, including identifying child abuse or neglect; legal definitions of abuse; responsibilities/requirements for reporting suspected child abuse and/or neglect; managing disclosures; understanding inappropriate behaviour; and compliant victimization. Training must be documented in the employee's agency file. In addition, this training must be included in every new staff member's orientation.

Interpretation G4

The PowerPoint presentation prepared by Big Brothers Big Sisters of Canada was originally designed for staff who are not in direct contact with children.

Ideally training should be directly received by all individual staff. It should not be facilitated via another trained staff member who attended an in person training.

Training is available from provincial child welfare offices, Canadian Centre for Child Protection, Canadian Child Welfare Research Portal: <http://www.cecw-cepb.ca/faqs> and the Red Cross, either free or for a minimal fee and delivery can therefore be customized specific to agency needs. Additionally, training can be accessed at http://members.bbbsc.ca/members/programs/default.asp?Programs_nationalstandards.inc.

5. The Confidential Reporting Form: Allegation of Abuse is forwarded to Big Brothers Big Sisters of Canada within three days of the agency staff's learning of the alleged abuse. (See Appendix F for **required form**)

Required form – See preamble for definition.

6. Where there is a documented report of abuse, a duplicate copy of related case records is made and stored by the agency.
7. When an allegation of abuse is received, the match is suspended and all adult parties to the match are notified by registered letter. The match is not resumed until the situation is clarified and appropriate intervention has taken place. (See Appendix G for sample letters)

¹ Either electronically or in printed format

OVERNIGHT VISITS

RATIONALE

Overnight Visits are a privilege for healthy and safe match relationships; they should never be considered a right for all mentoring relationships. Although overnights have some value to deepening the relationship, they can also introduce risk. To that end, agencies should seriously consider the purpose for the overnight and their risk mitigation strategies.

Please note:

- Standard G12 applies to all matches including mentee's who are 16 years of age or older.
- Even if a parent consents to more overnights the Standard applies
- When transferring a match from any Site-based or school based programs (one to one and group) to the Community-based program, overnights are permitted in the first year of the Community-based match if:
 - The volunteer was matched with the same child for one year or more.
 - The agency has had match support contact with the parent throughout the match.
- When mentees travel with other organizations such as Tim Horton's Camp the other organization assumes the liability. In this case, agencies should not make use of Big Brothers Big Sisters "release" or "consent" forms.

8. Overnight visits do not occur within the first year of a match.
9. After a match has been successful for more than one year, overnight visits may occur with the written and signed consent of the parent and agency for each such visit. This consent is included in the child's file. (See Appendix H for [required form](#))

[Required form](#) – See preamble for definition.

10. Overnight visits are restricted to no longer than three consecutive nights and no more than four visits per year.
11. These restrictions are waived where:
 - a. the Little Brother or Little Sister is 16 years of age or older; AND
 - b. has been successfully matched with the same volunteer in the 1:1 (community-based match) for one year or more.
12. Overnight visits do not occur outside of Canada under any circumstances.
13. Overnight visits do not occur without an assessment of the location for the overnight. (See Appendix H for [required form](#))

[Required form](#) – See preamble for definition.

14. Agency follow-up is required with match participants (separately) at the next scheduled match support contact to discuss the overnight.

H. POLICIES

1. The agency has written policy statements addressing the following:
 - a. client and volunteer privacy and confidentiality which specifies the conditions under which confidential information may be disclosed without consent (See Appendix I for sample language)
 - b. policy on responsible file maintenance and electronic documentation (see Appendix J for [required policy](#))

[Required policy](#) – See preamble for definition.

- c. volunteer eligibility related to criminal history which includes a statement that persons who have been convicted, or have outstanding charges of a sexual assault will not be permitted to serve in any capacity with the agency. (See Appendix GG for sample Relevant Offense Guidelines)
- d. Board and staff serving in a mentoring capacity.

Interpretation H1d

Re: Agency staff volunteering as a mentor, the following need to be considered:

- *When the Executive Director is the sole employee of the agency and performs both a Director and Caseworker function, a member of the Board with appropriate knowledge of social work and no personal links with the Executive Director, could be involved in the screening process as well as matching and match support. A neighbouring Big Brothers Big Sisters agency performing the same functions would be a more ideal solution.*
- *If the Director is an administrator, responsible for the hiring and supervision of one or many Service Delivery Staff, these person(s) should not be involved in any part of the mentoring relationship or process. As employees, there is definitely a conflict of interest.*

Re: Board members as mentor volunteers, possible solutions:

- *In one-person agencies, consider having the staff monitor the matches of Board members but exchanging the files on an annual basis with another Big Brothers Big Sisters agency in the area.*
- *In larger agencies, even though Board members may feel they get more personal service from the Executive Director, the Service Delivery Staff should conduct the screening, matching and match support.*
- *If allowed, Board member matches must be supported by an agency staff member who is not a person directly supervised or evaluated by the Board.*

- e. general child safety policies and procedures (See Appendix K for sample policy statements)
- f. the role of staff, Board members, mentors and parents in handling reports of unsafe and inappropriate behaviour, including allegations of abuse, toward children including details addressing agency disciplinary action in the case of a failure to report.
- g. dismissal of volunteers including an appeal process

Interpretation H1g

If a situation warrants the dismissal of a volunteer, the individual and, if relevant, the parent/guardian will be notified in writing, within one week of the decision being made, citing reasons (respecting confidentiality of information sources, where guaranteed) for the dismissal.)

- h. organizational accountability, responsibility and communications (See Appendix L for a sample organizational chart)
- i. Agencies must have a policy to ensure quality service is delivered throughout the year. At a minimum the policy must:
 - Address procedures to respond to and monitor any safety concerns when and if they arise during an agency closure or holiday period in excess of 2 weeks.
 - Address procedures for ensuring match participants² can always access services and obtain support when required.

² This includes match participants in all programs.

I. CONFIDENTIALITY

1. The service of the agency is delivered in a confidential fashion.
2. The security of all personal information is ensured by establishing and maintaining appropriate security controls.

J. DOCUMENTATION

1. The Agency will create and maintain a file for each applicant (child and volunteer) that contains copies of all required documentation including (where applicable) application, interview assessments, correspondence, signed forms, written assessments from professionals, signed case notes, match supervision notes and other relevant documents.

Interpretation J1

For In-School Mentoring and other site-based programs (depending on the Memorandum of Understanding), the partnering organization may house the child's file. In those cases, it is not required for the agency to have a copy of the child's file.

Files are required for children involved in all mentoring programs. The children's file must contain the documentation that applies to the program. Electronic (ie: Dynamics CRM) and hard copy (paper) files are acceptable.

2. Signed and dated match monitoring notes for scheduled contacts include:
 - a. reporting of any issues of concern;
 - b. possible courses of action suggested by [Service Delivery Staff](#) and course taken; details of resolution;
 - c. referrals to external agency(ies);
 - d. time spent with child and examples of match activities; and
 - e. an assessment of how the match is generally progressing.

[Service Delivery Staff](#) - See Standard C9 for definition.

3. Match notes relate only to that match or individual; generic notes are not acceptable.
4. Inactive files are kept for seventy-five (75) years, after which time, they are destroyed.
5. A random selection of case files is reviewed every 6 months to assess compliance with Standards: compliance with agency policies and procedures; quality assurance; and safety. Verification that file audits have been conducted will be retained. (See Appendix EE for [required policy](#))

[Required policy](#) – See preamble for definition.

Interpretation J5

Agencies have requested the option of asking a neighbouring agency to assist with case file audits. Before auditing another agency's case files a Release of Indemnity form must be signed. (See Appendix W for [required form](#))

K. ELIGIBILITY CRITERIA

1. There are written eligibility criteria for children's involvement in the Agency's programs that are consistent with the agency's mission statement and mandate.

Interpretation K1

Agency's eligibility policies and procedures applicable to children/youth:

- *Are consistent with the agency's mission statement and mandate;*
- *Comply with all applicable laws;*
- *Address the age of child, for example, that the Little is between 5 and 18 years of age (excepting special circumstances, e.g. Youth Vision Scholars); Address familial relationships, for example, that the Little is not a child or step-child of the Agency's paid staff or mentor volunteer;*
- *Address the family composition of the Little, for example, that the Little can be from a family of any composition; and*
- *Provide that individuals who do not meet the eligibility criteria are referred to other, more appropriate, services, where possible.*

2. There are written eligibility criteria for acceptance of direct service delivery volunteers which includes the following:
 - a. The applicant is a minimum of 18 years old; or younger in programs where appropriate³ supervision takes place;
 - b. The applicant is able to make a commitment consistent with program requirements;
 - c. Where the applicant has lived in the community for less than six months, the agency has documented evidence that the applicant's life situation is stable enough to fulfill the minimum length of service required by the [mentoring program](#).

[Mentoring Program](#) - See [Measuring Reach](#) document for the definition of a mentoring program

3. Where the volunteer is younger than 18, the agency has a policy addressing the enrollment process that is consistent with relevant legislation and takes into consideration their local police department's capacity and ability to provide [criminal record checks](#).

[Criminal Records Check](#) - See [Standard B10](#) for additional information.

³ "with appropriate supervision" could range from extra contact with the volunteer in order to debrief concerns to actual on-site supervision, etc.

L. ORIENTATION

1. Children, parents and volunteers are provided with information on the following:
 - a. the confidential nature of the agency's programs;
 - b. an overview of the programs;
 - c. the agency's responsibility to and expectations of both the parent and child;
 - d. the volunteer enrollment, matching, supervision and support expectations and the volunteer's role;
 - e. the [Pre-match Training Program](#).

[Pre-Match Training](#) - See Standard M rationale for details.

M. PRE-MATCH TRAINING PROGRAM

RATIONALE

Credentials of individuals delivering the Pre-Match Training Program: Big Brothers Big Sisters of Canada's pre-match training has a healthy relationship focus, with safety as a key component. The primary purpose of this training is to prepare match participants for their role in a healthy, successful mentoring relationship; to illuminate safety issues and strategies; and to make participants aware of resources and the support that is available to all match participants

The new Pre-Match Training resources (Strong from the Start) are streamlined, user-friendly and child-focused with an emphasis on healthy relationships. Strong from the Start, a key foundational component to fostering safe, enjoyable, meaningful, and healthy mentoring relationships, delivers the key messages, to youth, mentors and parent/guardians. For this reason it is essential that the Pre-match training be delivered by a qualified staff. If the school/partner is responsible for delivering the program they must appoint an individual with credentials that are compliant with Standard C12.

Prior to participation in an agency [mentoring program](#), training in the core topics and key messages of Big Brothers Big Sisters of Canada's [Pre-Match Training](#) is provided to:

1. Service delivery volunteers in all mentoring programs.
2. Children/youth in all mentoring programs; and
3. Parents/guardians in all Community-based mentoring programs.

Training is reinforced as necessary.

[Mentoring Program](#) - See Measuring Reach document for the definition of a mentoring program.

[Pre-Match Training](#) – See Standard M rationale for details.

Interpretation M

In order to be able to respond with comprehensive information should a claim of misconduct move forward, the agency may need to provide details of the training and orientation programs in which mentors and mentees participated. To that end, agencies need to keep a copy of all related materials.

N. MATCH CLOSURE

RATIONALE

Mentoring relationships can end for a wide range of reasons that are both predictable (e.g. conclusion of the academic year program) and unpredictable (e.g. moving). Closure may also occur as a result of interpersonal or practical challenges that result in the mentor losing interest or motivation to sustain the mentoring relationship. Regardless of why the mentoring relationship is ending, service delivery staff should always try to ensure the relationship ends on a positive note for all involved, but particularly for the child. The closure process provides for an opportunity to reflect on the outcomes of the mentoring relationship and an opportunity for match participants to discuss their experiences in the relationship. Additionally, the process provides for an opportunity for staff to evaluate how the mentee and mentor participated in the mentoring relationship. Finally, the closure process provides the mentee with a model of the behaviour and processes to bring a relationship to a healthy and appropriate close.⁴

Current mentoring research, has clearly indicated that poor match endings can undo all the benefits gained by a child from a mentoring relationship...and in some cases, even be harmful. Therefore, it is essential to fully integrate a match closure process as part of Service Delivery with the goal of a positive match closure for all parties, especially the child/youth. As Service Delivery staff, it is essential to provide structure, support and coaching to Volunteers, children and families to normalize match closure. The closure process ensures that Service Delivery Staff invest just as significantly in positive match closures as they invest in making quality matches.

Match closure must be documented and must include:

- a. Interactive communication among all match participants (child, volunteer, parent/guardian and agency) if possible;
- b. An opportunity to reduce any adverse effects from the match closure for the child and to strengthen the positive impacts of the relationship;
- c. the reason(s) for match closure;
- d. An assessment of and celebration of the accomplishments of the relationship;
- e. Recommendations of the appropriateness for rematch and re-engagement of the parent/guardian, child and/or Volunteer
- f. Where there are child safety concerns, every attempt must be made to meet with match participants individually
- g. If a match closure interview with all parties cannot be completed, the reasons are documented.
- h. Written notification of match closure to all parties within two weeks of the match closure. (see Appendix II for [required language](#)) Notification must be sent via registered mail for those matches that end as a result of child safety concerns.

[Required language](#) – See preamble for definition.

⁴ For additional information around match closure Appendix II contains the “Mentee/Mentor Termination Ritual”, Courtesy of Michael J. Karcher, Ed.D., Ph.D., Professor, Counseling, College of Education and Human Development, University of Texas at San Antonio

O. RE-MATCHING

RATIONALE

Re-matching allows for a time of intentional pause to allow Service Delivery Staff to take a purposeful, fresh look at the party(ies) requesting to be re-matched. This pause is crucial in allowing Service Delivery Staff the time to be reflective, and to integrate new information and identify possible trends that were not recognized while immersed in supporting and monitoring the match. This can create a fuller context in which to make decisions about how best to proceed with re-matching either the child, the volunteer, or both.

When someone external to the match (an “external pair of eyes”) provides information or reviews a file, they can better identify areas where more questions may need to be asked. It is important to determine the eligibility and suitability of the match party for a safe, effective next match. Further it is imperative for both the mentor and the mentee to feel closure with their previous relationship before they are matched with someone else. The information from the closure process may be critical to successfully re-matching the mentee or mentor.

Before **re-matching** any volunteer or child/youth a **re-assessment** process must be conducted and documented that includes, at minimum:

- an objective review of any successes and/or issues involving previous matches, including training and support needs;
- a review of reasons for match closure;
- a review of motivation for and commitment to re-matching;
- reinforcement and updating of key messages from **pre-match training**;
- in the case of a child/youth, an update to their circumstances from the time of initial enrollment (including those who have been on the waiting list for one year or more)

In addition to the above re-assessment process, for Mentors who have not been screened within the last three years or whose previous match has been closed for a year or more, **re-screening** must occur, including, at minimum:

- an update to the mentor applicant interview
- a **criminal records check**
- references, including at least, if possible one of the original referees from the time of application

Re-match - After a current match has closed, the matching of the same volunteer with a different child or the same child with a different volunteer

Re-screen/ Re-assessment - The process of updating and reviewing the agency’s information on the volunteer or child to ensure files are up to date and the volunteer and/or child is still eligible for agency involvement.

Pre-Match Training - See Standard M rationale for details.

Criminal records check - See Standard B10 for additional information.

Interpretation O

The re-assessment process includes “an objective review”. The intent of this statement is for a person who is not managing the case file to conduct the file review.

When re-screening mentors the agency is expected to complete the Fitness to Mentor document.

P. CHILD INTAKE AND PARENT APPLICATION PROCESS

1. Applications are at the request of the parent/guardian and include the verbal agreement of the child.
2. The Application process includes the following elements:
 - a. A written application signed and dated by the parent/guardian (For community-based mentoring, see Appendix M for [sample Application](#); for Adult In-School Mentoring, see Appendix MM for [required language](#)).⁵
 - b. Informed Consents (to obtain and release information) that are consistent with provincial legislation (See Appendix N for [required form](#))
 - c. A process where the child and parent/guardian are interviewed.(See Appendix O for [required form](#))
 - d. An assessment of the child's needs and interests. (See Appendix O for [required form](#))
 - e. [Pre-match Training](#) (See Appendix P for [required language](#))
 - f. Notification and documentation of acceptance/ rejection (See Appendix Q for [sample letter](#))

Interpretation P2f

The parent/guardian/volunteer applicant is notified in writing of rejection but can be notified of acceptance either by letter or by conversation. Notification of acceptance by conversation is recorded in casenotes (including how notification was made, e.g. by phone or in person).

- g. Written parental consent to use the child's photograph or personal circumstances in a public venue, including for internal agency purposes, prior to use. (See Appendix R for [sample form](#))

[Pre-Match Training](#) - See Standard M rationale for details.

[Sample application, letter and forms, required language and forms](#) – See preamble for definitions.

AT A GLANCE:

Step in the Application Process	Community-Based Program	Site-Based Program	On File
Orientation	REQUIRED	NOT REQUIRED	NOTATION
Application form	REQUIRED	NOT REQUIRED	APPLICATION FORM
Informed Consent	REQUIRED	REQUIRED	INFORMED CONSENT
Assessment of child's needs	REQUIRED	NOT REQUIRED	ASSESSMENT OF CHILD'S NEEDS AND INTERESTS
Child/parent interview	REQUIRED	NOT REQUIRED	FINAL ASSESSMENT (FAMILY)
Notification of Acceptance/rejection	REQUIRED	NOT REQUIRED	DOCUMENTATION OF NOTIFICATION
Pre-Match Training	REQUIRED	REQUIRED ⁶	STATEMENT OF COMPLETION OF PRE-MATCH TRAINING
Photo/ media consent	REQUIRED BEFORE USING MEDIA	REQUIRED BEFORE USING MEDIA	MEDIA CONSENT

⁵ Not required for school-based group mentoring programs, site-based group mentoring programs or teen mentoring programs

⁶ Can be delivered by the site-based partner or by the agency.

Q. MENTOR VOLUNTEER ENROLLMENT PROCESS

RATIONALE

References: If conducted well, references about applicants are key sources of meaningful information. Regardless of the method used to conduct references (phone, email, mail) they must be obtained in a way that allows for **interaction**. It is not sufficient to receive a reference via mail; an email address or phone number must be provided in order to have the ability to probe further if needed. Interacting with select referees allows the agency to probe responses in detail in order to create a full picture of the relevant aspects of the applicant's life and experiences as is relevant to the volunteer opportunity. Agency staff should feel comfortable requesting specific individuals as referees in order to explore relevant experiences.

“Paid Mentors”: Agencies across the country are finding innovative and strategic ways to increase the number of children served. Some agencies have hired mentors to facilitate and manage site-based group programs. The Standards do not prevent agencies from hiring mentors, however, the site-based program Standards still apply to all matches whether the mentor is a volunteer or hired by the agency, for instance:

- All matches lead by “paid mentors” must be in compliance with the site-based match monitoring schedule as well as the Standards addressing: closures, re-matching etc.
- The volunteer enrollment Standards are not appropriate for agency staff, therefore, the “paid mentor” files must be in compliance with all Human Resource Management Standards (section C).

1. Volunteer Registry

Names and birthdates of all volunteer applicants⁷ are submitted to the [Volunteer Registry](#) within two weeks of a status decision. All volunteer applicants must be cross-referenced with the Volunteer Registry prior to acceptance. If the applicant has been identified as a volunteer in another Big Brothers Big Sisters agency, that agency must be contacted.⁸ The date and result of the check is documented in the volunteer's file (See Appendix HH for [required form](#))

Volunteer Registry - The Volunteer Registry is a tool that identifies candidates who have been involved with a Big Brothers Big Sisters agency(ies) in Canada. It was created to equip agencies with a tool to help make the most informed decision possible regarding volunteer applicants. One of the best indicators of future performance in terms of match safety and quality is previous match experience. However, open and detailed communication between agencies is critical to achieve the desired results.

Required form – See preamble for definition.

Interpretation Q1

Once a candidate has been identified as a volunteer in another Big Brothers Big Sisters agency, the agency must connect with the Big Brothers Big Sisters agency that has identified him/her as a volunteer. By this time the volunteer has signed a release to share information (The Volunteer Permission and Release Form)

Documentation includes the required form Appendix HH. Additionally, if no information is available from the agency that has identified the candidate as a volunteer, the agency requesting the information must document that they have made every effort to obtain the information and that they have mitigated risk in some other way, e.g. asking for an additional reference.

Agencies are encouraged to develop policies/procedures/best practices that determine the best course of action, for example, determining which agencies carries the cost for retrieving closed files stored offsite. (E.g. Iron Mountain)

2. The volunteer enrollment procedure includes the following elements:

- a. a written application, signed and dated by the volunteer (See Appendix S for [sample application](#))
- b. Volunteer Permission and Release form (See Appendix T for [required language](#))

Required language and sample application – See preamble for definition.

- c. A [criminal records check](#), including a vulnerable sectors check

⁷ Includes Board Members

⁸ By this time the volunteer has signed a release to share information – the Volunteer Permission and Release form.

- d. An agency shall obtain at least three references for any mentor applicant as follows: :
 1. The applicant's significant other or, if there is no significant other⁹, from a family member
 2. An employer or volunteer supervisor of an organization dealing with vulnerable populations or, if no such experience exists within the previous five years, from a relevant individual associated with the applicant's employment or educational official; and
 3. A personal reference who has known the applicant for at least two years.

Agency staff must obtain information from each reference that allows for follow-up discussions, in person, by phone or otherwise. .

All references must be reviewed and assessed by [Service Delivery Staff](#).

If the required combination of references cannot be obtained or if enough detail was not gathered, further action is taken to obtain the additional information needed to make a good decision. The reasons for obtaining additional information and the steps taken to gather that information are to be documented in the applicant's file. (See Appendix U for [required forms](#))

[Service Delivery Staff](#) - See Standard C9 for definition.

[Criminal records check](#) - See Standard B10 for additional information.

- e. An in-person individual volunteer interview. (See Appendix V for [required language](#))
- f. An assessment of the volunteer's home environment for the purposes of thoroughly assessing: family relationships; match compatibility; stability; potential contact with others (e.g. residents, relatives, friends, etc.); and environmental safety issues (e.g. allergies, access to water (pools, ponds, lakes, etc.), animals, etc.)
- g. [Pre-Match Training](#) (See Appendix Z for [required form](#))
- h. Timely notification of acceptance/rejection (See Appendix X for [sample letter](#))

[Pre-Match Training](#) - See Standard M rationale for details.

[Required and sample forms, language, application etc.](#) – See preamble for definitions.

Interpretation Q2h

See Standard P2f for interpretation.

- i. Signed and dated Agreement of Confidentiality
- j. The Screening Checklist. (See Appendix Y for [required form](#))
- k. Written consent to use the individual's photograph or personal circumstances in a public venue, including for internal agency purposes, prior to use. (See Appendix R for [sample form](#))
- l. Cross-reference the [Volunteer Registry](#) prior to acceptance

[Volunteer Registry](#) - See Standard Q1 for definition.

3. Other individuals involved with the children of the agency do not require screening if their involvement is:
 - a. In a non-mentoring capacity AND
 - b. in an environment supervised by agency staff, or screened and approved volunteers.

⁹ Partner of the applicant, married or otherwise

AT A GLANCE:

Step in the enrollment process	Community-Based Program	Site-Based Program	On File
Orientation	REQUIRED	REQUIRED	NOTATION
Volunteer Registry	REQUIRED	REQUIRED	NOTATION
Written application	REQUIRED	REQUIRED	VOLUNTEER APPLICATION
Volunteer permission/ release	REQUIRED	REQUIRED	VOLUNTEER PERMISSION AND RELEASE
Criminal Records & Vulnerable Sectors Check	REQUIRED	REQUIRED	ORIGINAL WHERE POSSIBLE
Offence Declaration	REQUIRED	REQUIRED	OFFENCE DECLARATION FORM
References	3 REQUIRED	3 REQUIRED	RESULTS
Volunteer interview	REQUIRED	REQUIRED	INTERVIEW ASSESSMENT
Assessment of home environment	REQUIRED	NOT REQUIRED	ASSESSMENT
Pre-Match Training	REQUIRED	REQUIRED	STATEMENT OF COMPLETION AND UNDERSTANDING OF PRE-MATCH TRAINING / QUESTIONNAIRE ¹⁰
Agreement of confidentiality	REQUIRED	REQUIRED	FORM
Screening Checklist	REQUIRED	REQUIRED	SCREENING CHECKLIST
Notification of acceptance	REQUIRED	REQUIRED	DOCUMENTATION OF NOTIFICATION
Photo/media consent	REQUIRED BEFORE USING MEDIA	REQUIRED BEFORE USING MEDIA	REQUIRED BEFORE USING MEDIA FORM

¹⁰ See Appendix Z for required form.

R. MATCHING AND MATCH MONITORING

RATIONALE

Match Monitoring: The intent of Match Monitoring and Support is for Service Delivery staff to monitor, coach and guide the match in order to promote the development of the match relationship, child safety and positive youth development.

1. Written goals are set for each match and progress towards achievement reviewed annually. The reason for making the match is written into the goals. Documentation of the goals and the annual review is kept on file. (See Appendix FF for [sample form](#) and rationale)
2. The child (and parent/guardian where possible), volunteer(s) and [Service Delivery Staff](#) attend the match introduction meeting.
3. Mentor volunteers complete an annual Offence Declaration Form to update their record history with any new investigations, allegations, Criminal Code convictions, or pardons related to sexually based offences. Completed declarations will be maintained in the volunteer's file. (See Appendix DD for [required form](#))

[Service Delivery Staff](#) - See Standard C9 for definition.

[Required and sample forms, language etc.](#) – See preamble for definitions.

Interpretation R3

See Standard B11 for interpretation.

4. The agency has a procedure addressing volunteer and parent non-compliance of match monitoring Standards.
5. The agency has a method of tracking match monitoring contacts and outcomes of those contacts. (See Appendix BB for [required language](#))
6. a. Each agency establishes the requirements and guidelines for match supervision for all concerned while meeting the minimum requirements.
b. Electronic communication (email/text) can be used by [Service Delivery Staff](#) as an acceptable method of conducting match support for all matches, regardless of age of match, so long as all of the following criteria are met:
 - a. Electronic communication (email/text) does not ever replace a Face to Face required contact
 - b. Electronic communication (email/text) does not become the primary means of match contact
 - c. Contact via electronic communication (email/text) must be two way and show substantive interaction, follow-up and coaching. Sending a contact request via electronic communication (email/text) does not count as a contact.
 - d. Certain match challenges may necessitate telephone follow-up or a face to face meeting. Follow-up with additional, appropriate intervention is required. [Service delivery staff](#) should use best judgment to decide when a face to face meeting is advised.

[Service Delivery Staff](#) - See Standard C9 for definition.

COMMUNITY-BASED MATCH MONITORING AND SUPPORT

Timeframe	Volunteer ¹¹	Parent/Guardian	Child
One month	TELEPHONE	TELEPHONE	
Two month	TELEPHONE	TELEPHONE	TELEPHONE
Three month	TELEPHONE	TELEPHONE	
Four month	IN-PERSON: MATCH SUPPORT FRAMEWORK ¹²	IN-PERSON: MATCH SUPPORT FRAMEWORK	IN-PERSON: MATCH SUPPORT FRAMEWORK
Six month	TELEPHONE	TELEPHONE	TELEPHONE
Eight month	TELEPHONE	TELEPHONE	TELEPHONE
Ten month	TELEPHONE	TELEPHONE	TELEPHONE
Twelve month	IN-PERSON: MATCH SUPPORT FRAMEWORK	IN-PERSON: MATCH SUPPORT FRAMEWORK	IN-PERSON: MATCH SUPPORT FRAMEWORK
For matches that have lasted 12 months or more:			
Quarterly contact	TELEPHONE AND/OR E-MAIL	TELEPHONE AND/OR E-MAIL	TELEPHONE AND/OR E-MAIL
Annually	IN-PERSON: MATCH SUPPORT FRAMEWORK	IN-PERSON: MATCH SUPPORT FRAMEWORK	IN-PERSON: MATCH SUPPORT FRAMEWORK

GROUP PROGRAMMING IN THE COMMUNITY

7. If a group program is functioning in the community, then the Community Based Match Monitoring and Support schedule applies.

SITE-BASED MENTORING

8. Agencies delivering a site-based program have a signed Memorandum of Understanding with the participating organization(s) (e.g. Boys' and Girls' Club or School Board, etc.). (See Appendix CC for [sample Memorandum of Understanding](#)). The following terms are addressed in all Memorandums of Understanding:
 - a. Responsibilities for monitoring the match.
 - b. Access to organizational personnel on-site who can provide assistance.
 - c. Access to individuals at the agency who can provide assistance.
 - d. Match activities take place on the property of the organization.
 - e. The agency has a written policy addressing match attendance at agency-sponsored events and events sponsored by the partner organization.
 - f. The agency has a written policy addressing whether the mentor may provide transportation to the mentee to off-site events. Attention is paid to safety and risk management.
 - g. The agency has a policy that addresses contact outside of the parameters of the program which considers the risks associated with the various types of contact (email, phone, letter, etc.) and the location of that contact. In-person contact during the summer for In-School Mentoring is not allowed.
 - h. The conditions for reassessment of the child.
 - i. The responsibilities of each Partner in the event of match closure, including a requirement for each party to notify the other of changes in match status.
 - j. The responsibilities and rights regarding external communications especially related to the media

[Sample MOU](#) - See preamble for definition.

¹¹ The match monitoring requirements apply to both parties in a Couples match.

¹² See Appendix AA for required form.

Interpretation R8

If an agency is operating a site-based program without a partner, in order to follow the Site-Based Match Support schedule the agency must:

1. develop a policy which addresses Items a through j of Standard R8, in lieu of a Memorandum of Understanding.
2. take appropriate steps to mitigate risk

Interpretation R8g

The agency recognizes that once the match has closed, there will no longer be contact between mentor and mentee.

PRE-MATCH TRAINING PROGRAM

9. Children and youth matched in a Site-Based Mentoring Program can participate in a [pre-match training](#) program delivered by the partner organization, provided that it encompasses the core topics and key messages of Big Brothers Big Sisters of Canada's Pre-Match Training.

The agency needs a copy, or at minimum, an outline of the partner organization's program. If the partner organization does not deliver all of the key messages, the agency has the responsibility to do so. Parental consent is obtained. That consent could be part of the original parental consent to participate in the [Mentoring program](#).

[Pre-Match Training](#) - See Standard M rationale for details.

[Mentoring Program](#) - See Measuring Reach document for the definition of a mentoring program

Interpretation R9

In many site-based mentoring programs, the partner organization maintains and manages the child's/ youth's file. It is the partner organization's responsibility to retain a signed informed consent from the parent. If the agency is going to deliver all or part of the Pre-Match training to the child/youth, then the school is responsible for notifying the parent/guardian of that arrangement and for obtaining consent. If this arrangement does not exist in your site-based mentoring program, then your Memorandum of Understanding needs to clarify your particular arrangement.

SITE-BASED MATCH MONITORING AND SUPPORT

Type of Contact	Frequency	Persons Involved
Telephone or in-person	Beginning, middle, and end of program ¹³	Mentor Child (where possible)

SITE-BASED GROUP PROGRAMMING

10. If a group program is functioning in an organization, where :
 - a. a Memorandum of Understanding has been negotiated;
 - b. there is a program start and end date;
 - c. there is no opportunity to spend time in the volunteer's home;
 - d. there is limited one-to-one time in the car;
 - e. the majority of programming/activities happen at a site;
 - f. then the above match monitoring schedule applies.

(For more detailed clarification see the Measuring Reach Document)

Interpretation R10

See R8 for interpretation.

¹³ Match monitoring is in addition to the match introduction meeting and the match closure meeting.

S. CASE MANAGEMENT SYSTEM

1. Agencies that use Dynamics CRM use the system in accordance with the “Dynamics CRM Standards of Use” document. (See Appendix SS)

See Appendix WW for list of appendices.