

# Matching Policy/Procedure

## *Best Practice Resources – Developing a Match*

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This sample Matching Policy can be modified to fit the context of your specific mentoring program. Your matching policy should be detailed in writing in your employee handbook, reviewed during an orientation, and where appropriate, modeled for new staff through an on-the-job training process.

### **Making a Match**

#### *Research Informed Practice:*

Evidence-based research in the field of mentoring suggests that youth outcomes are strengthened when program goals align closely with the background and experience of potential volunteers, and when programs match youth and adults with shared or similar interests.<sup>1</sup>

#### *Agency Statement:*

*(Insert name of agency)* has adopted a policy and process for matching volunteer mentor and youth participants. Mentor coordinators or other staff making matching decisions will use the following procedure when pairing participants.

*(Insert explanation of program's goal and rationale for order of match criteria)*. E.g. Given that *(Insert name of Mentoring Program)* supports youth in foster care to help them attain higher education, our matching strategy involves pairing youth with adults who have achieved higher education and who share similar experiences or interests with our youth participants. Criteria that a coordinator should consider during the matching process are listed below and ranked in order of application.

- Same gender
- Common interests (Including Academic Interests/focus)
- Shared/similar experiences
- Personality compatibility
- Geographic proximity
- Youth choice

#### *Matching Procedure:*

Before a mentor coordinator begins the matching process, he or she will review the prospective mentor and mentee files to ensure that both the youth and adult have completed the necessary program participation forms and screening practices.

A mentor coordinator should begin the matching process by organizing a potential pair by gender. Match suitability should be further assessed by identifying a volunteer's interests, experiences and educational background, and aligning these qualities with those of a youth with same or similar interests, experiences and educational interests. The mentor coordinator should then consider the personality traits of both the volunteer and mentee, looking for complimentary styles and commonalities. Finally the mentor coordinator should consider the geographic proximity of the volunteer and mentee. If multiple mentors share similar interests, experiences, educational background, and are both considered geographically accessible, a description of each mentor should be provided to the youth where upon he/she can indicate a preference. The "Match Rationale Form" will be employed to document the match coordinator's application of this matching process.

### A mentor coordinator will use:

- The “Mentor Application” administered at the start of the screening process to identify information on the volunteer’s gender, life experience, educational background and geographic location. The same information can be referenced for the youth in the “Participant Application.”
- The “Mentor Interview” administered during the screening process to locate information on the volunteer’s life experience, interests, and personality. The same information can be referenced for the youth in the “Youth Interview & Orientation.”
- The “Mentor Personality Quiz” and “McClelland Motivation Analysis” completed during the mentor orientation to gain information on a volunteer’s personality style and motivation to mentor. Information regarding the youth’s personality can be found in the “Youth Interview”, “Participant Referral”, and “Participant Application.”

### *Matching Process from Application to Meeting:*

When an individual expresses interest in serving as a volunteer mentor with (*Insert name of Mentoring Program*), he or she will first complete a volunteer application. After the application is received, the mentor coordinator will follow-up with the prospective volunteer and schedule a time to meet with the applicant for an in-person informal interview and to take the prospective volunteer’s fingerprints. This interview will generally last 45 minutes to one hour and allows the mentor coordinator to develop a better sense for who the applicant is and how they can positively contribute to the development of a young person. After the program receives clearance on a volunteer’s background check, the potential mentor will attend a new mentor orientation. Once the volunteer has completed all formal paperwork and participated in the new mentor orientation, he or she will be contacted by the mentor coordinator and notified about a youth awaiting the support of a mentor. The mentor coordinator may share the following information about a potential mentee to gauge the volunteer’s interest.

- First name
- Gender
- Age and grade
- Interests and personality
- Referral source
- Eligibility for the program

If the volunteer is comfortable moving forward with the matching process based on the information provided, the mentor coordinator will arrange a time for the youth, mentor and coordinator (and youth’s family if interested) to sit down together. During this meeting the group will discuss the components of the mentoring relationship and program expectations. If the pair agree to the program guidelines, a weekly meeting time, and commit to the mentoring relationship, the pair will sign respective program commitments (Mentor Commitment, and Youth Participation Agreement). At this point the pair is considered officially matched and may be given permission to begin their mentoring relationship.

For the first two weeks of the mentoring relationship the mentor coordinator will check in on the match either in person, by phone, or email to support and troubleshoot any initial relationship development pitfalls. From here after the mentor coordinator will correspond with the volunteer mentor by phone or email, and with the youth’s parents on a monthly basis to support the on-going development of the mentoring relationship.

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<sup>1</sup> DuBois, D. et al. “How Effective Are Mentoring Programs for Youth? A Systematic Assessment of the Evidence.” Psychological Science in the Public Interest. (2011). *Courtesy of Oregon Mentors.*