

User Manual

# Staffing Calculator for Match Support

Resource developed by Mike Garringer and Naida Silverthorn for the National Mentoring Resource Center, a project of the Office of Juvenile Justice and Delinquency Prevention

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# Background

This project was conceptualized and developed as part of the work of the National Mentoring Resource Center, a project of the Office of Juvenile Justice and Delinquency Prevention.

The goal of this tool is to allow end users (primarily youth mentoring program staff, but also possibly funders, researchers, and other stakeholders) to put an estimate on the amount of staff time it might take to properly **match, monitor, support, and close their mentoring matches** over the course of one calendar year. Ultimately, the aim is to help programs put an adequate amount of time and energy into making and supporting matches to improve match quality, retention, and outcomes for participants.

The emphasis in this tool on match-to-closure tasks grew out findings presented at the of the 2016 Summer Institute on Youth Mentoring, where new research and practitioner conversation suggested that many mentoring programs are struggling with giving match support specialists (MSS) enough time, resources, and flexibility to do their many tasks properly. This results in matches that struggle to overcome simple barriers and face risk for closing prematurely. Therefore, this tool focuses specifically on the staffing needed to make matches, support and monitor matches, and eventually, close those matches. Currently, the tool *does not address pre-match tasks*, like mentor recruitment, participant screening and training, and other general “onboarding” work, nor does it address other program activities, such as fundraising, marketing, evaluation tasks, or other program management responsibilities.

The calculator works by having the end-user provide a series of inputs (estimated time and frequency of tasks), producing a reasonable estimate on the amount of total time it takes to support a match over one calendar year. Even though matches in many programs last longer, a 12-month period is the most common timeframe for staffing and budgeting considerations, so the tool is grounded in this framework. The calculator is designed to add up total staff time, which also enables accounting for cases in which tasks are split across multiple staff members. Therefore, the result of the calculations is both a total number of hours for the year and a breakdown of that time in terms of FTE employees needed to execute those tasks.

## How Tasks and Time Estimates were Determined

The tasks listed here were generated using several sources, including the 4<sup>th</sup> Edition of the *Elements of Effective Practice for Mentoring* produced by MENTOR: The National Mentoring Partnership, which lists many of the specific activities that research and practitioner experience suggests are important for running a quality mentoring program. These tasks were further influenced by the conversations at the 2016 Summer Institute on Youth Mentoring, which highlighted both emerging research and practitioner discussions of what tasks go into making and supporting matches and where staff may struggle to follow program policies to the letter due to staffing shortfalls and other factors. The list was then further refined by a project

working group, consisting of NMRC Research Board Chair David DuBois, Research Board member Tom Keller, Research Board Associates Naida Silverthorn and Fasika Alem, and MENTOR's Director of Knowledge Management, Michael Garringer.

The time, duration, and frequency estimates were initially drafted by Garringer based on discussions from the Summer Institute and his lengthy experience as a technical assistance provider to countless mentoring programs over the last decade. As with the development of the tasks themselves, these time estimates were then further refined by the working group to the ranges presented here.

In the early summer of 2017, the team worked with several technical assistance providers, OJJDP-funded mentoring programs, and other reviewers to try the tool in real-world settings to ensure that the task lists were comprehensive of the many activities staff engage in and that time estimates represented what most programs would experience in carrying out the work. Their feedback was invaluable in making modifications and updates to the tool and manual to make it more accurate and practical for use in the field.

In the future, we will also be comparing the time estimates referenced here with any research that speaks to the realities of how programs address these tasks in programs that have been rigorously studied.

# Using the Staffing Calculator Tool

## Organization of the Staffing Tool

The Staff Calculator Tool (an Excel workbook) is organized in tabs around a series of task types. The Staff Calculator Tool Worksheet (and the definitions summarized in the Appendix to this document) also follow this categorization of tasks, as follows:

- Matching
- Monitoring and Support (1<sup>st</sup> Year)
- Monitoring and Support (matches of 1+ year duration)
- Extraordinary Match Support
- Ongoing Training and Group Activities
- Match Closure
- Administrative Tasks

Several of the specific tasks reference specific topics or activities detailed in the 4<sup>th</sup> Edition of the *Elements of Effective Practice for Mentoring*<sup>TM</sup> (EPPM4). A checklist based on the EPPM4 can be found at the following link: [http://www.mentoring.org/new-site/wp-content/uploads/2015/10/Final\\_Elements\\_Checklist\\_Fourth.pdf](http://www.mentoring.org/new-site/wp-content/uploads/2015/10/Final_Elements_Checklist_Fourth.pdf)

The Excel workbook has one final tab, “Final Adjustments and Totals”, which draws on data entered in the prior worksheets to compute a total number of staff hours per year, and an estimate of staff needs in Full Time Equivalents (FTEs).

Data to be entered is organized by amount of time by relevant unit (per match, per contact, per activity or event) and then the number of times the task is expected to occur in a 12-month period. In the case of per-match data, the values are given on a per-match basis, with later computation coming up with a total based on the number of matches expected to be made, served, and closed within a one-year period.

## Obtaining Base Time and Frequency Estimates

Use the Staff Calculator Tool Worksheet to estimate the per-instance time and the annual frequency (per match or activity). In the case of smaller agencies where a more limited number of core staff cover most direct service responsibilities, this information could be entered directly into the Excel workbook. In the case of larger or more departmentalized agencies (where specific tasks are undertaken by different staff positions within the agency or program), it is likely that input would be required from a larger number of people each using the Worksheet to enter their time and frequency estimates. A final decision would be required to reach consensus on a master list of time/frequency for a particular program before using the calculator.

For each task, an estimate should be made for the *typical* amount of time spent on the task, and then the number of times that task occurs within a 12-month period. The calculator provides what we currently believe to be a reasonable range of time to address each task effectively. If your program spends more time on a particular task (for example, in the case of programs that reach youth with more extensive needs as their core client base), you would simply enter the larger time estimate.

**Example:** A community-based mentoring program has check-ins two times per month for matches within the first year. Accounting for extra time to reach the mentor (with call-backs), the agency determines that each contact takes about .5 hours of staff time. For the entry “Conduct check-in calls with mentors discussing the topics recommended in the EEPM4” a value of .5 would be entered for *Program Hours Spent on Task (per match)* and a value of 24 would be entered for *Program Frequency of Task (per year for each match)*.

Task (see manual for full descriptions)	Task Estimates per Match (duration & frequency)	Program Hours Spent on Task (per match)	Program Freq. of Task (per year for each match)	Total Hours Per Match Per Year
Check in with mentors discussing the topics recommended in the EEPM4	<b>Duration:</b> This task is expected to take between .25 and 1.0 hours depending on the depth of the check-in and the amount of information tracked by the program and shared with the mentor. <b>Frequency:</b> This task is likely to happen 12-24 times per year in most community-based programs, while site based programs may only do this type of check-in monthly (12 times per year).	0.5	24	12

If your program does not do a particular task, this can be left blank in the calculator. If your program does additional tasks that do not seem to be reflected in the tasks as defined for this calculator, the Excel worksheet has spaces that allow for additional tasks to be added in each of the categories.

### Adjustments for Tasks that are Combined

For some programs, because of the procedures they use to support program participants, a single contact or event may include coverage of several of the specific tasks listed in the calculator. If time estimates are given individually by task, this may result in overestimating total time estimates and overall staffing needs. Be sure to note when using this when a particular task’s time has already been covered by another item, and enter a “0” so that it is not double counted.

### Adjustments for Diverse Mentoring Models

The draft calculator is based on a one-to-one mentoring model (either community- or site-based) and thus may be less applicable to other models (e.g., group mentoring). For group mentoring programs, this calculator may still prove useful as several of the tasks will apply regardless of model (e.g., forming the group/matching mentors to mentees, checking in with participants, and closing down the match/group). Group mentoring programs using the calculator may have to creatively use some of the definitions and think about how they apply

best to the particular context of their program. The Excel file of the calculator is completely editable, however, and we encourage programs to further modify it to meet their needs.

## Entering Data to the Staffing Calculator


The “Worksheet” file that accompanies the calculator is designed to mirror the structure of the Excel workbook itself. It can be useful in noting some rough estimates on paper before using the Excel tool. Programs should only use the worksheet version more intensively if they want to gather the opinions on time estimates from many staff members who may share or have overlapping responsibilities related to match support. In large agencies it can be useful to get agreement on task time and frequency before using the Excel workbook.

Starting with the first tab (Matching), enter your time and frequency estimates (or, if you’ve filled it out, the values from the worksheet) into the spreadsheet.

On the final tab (Final Adjustments and Totals), you will be asked to enter 3 additional values:

- Number of new matches made by the program each year
- Number of ongoing matches in the program each year
- Number of all matches that close each year

Total Hours Calculator	Number of Matches
Number of new matches made by the program each year	(enter # here)
Number of ongoing matches in the program each year	(enter # here)
Number of all matches that close each year (real or estimated)	(enter # here)
Extraordinary match support	N/A
Ongoing training & group activities total	N/A
Admin tasks	N/A



Once these values have been entered, you will see a total number of staff hours estimated for a 12-month period, and an estimate for Full-Time Equivalent (FTE) employees. ***It should be noted that the FTEs are not meant to imply the number of full-time staff that should be doing these various tasks;*** the agency or program determines how many employees (either full or half-time) would be needed to conduct the work.

***Example:*** A program uses the calculator and determines that their total hours comes out to the equivalent of 2.5 FTE positions. The program determines that they can hire one full-time staff person dedicated to these tasks, and have 3 other staff working at 50% time to meet the total estimated staffing needs of the mentoring program.

### Additional Adjustments for Start-Up Programs

The calculator’s time and staffing estimates are based on the assumption of a currently-operating program that has active matches entering and leaving the program (i.e., that the program will be running at capacity throughout the year). For a program using this calculator to estimate starting a brand-new program, an adjustment will need to be made to accommodate the fact that the staff time will “add up” as new matches are enrolled over time.

**Example:** An agency starting a brand-new mentoring program estimates that half of their estimated annual matches will be made at the start of the program, and the remaining half at mid-year. The program obtains their hours total using the total number of matches they expect to make and support within the first year, and then multiplies the 12-month total by .75 to get a more accurate estimate, as the full amount of staff time required for matching and match support will not be used until halfway through the program’s year.

### Using the Staffing Calculator to Determine How Many Youth Can Be Served

For programs that have their staffing already set, there may be greater interest in using the calculator in reverse—in other words, if you have the set FTE values for the staff that you have, how many youth can your program serve?

At present, the calculator is not designed for entry of FTE totals and time totals in order to calculate number of youth ideally served. However, this use of the tool is possible with some trial and error. First, time and frequency values for the various program tasks need to be entered to the calculator. Then, using the final tab of the Excel sheet (Final Adjustments and Totals), enter “best guess” estimates for the number of new matches, number of ongoing matches, and number of match closures. This will give a total number of staff hours, and then calculate a numeric value of FTE equivalent:

	0	(This total is based on a standard 40 hour per week position over a full year of 2080 hours, not including vacation and other time. Note that this FTE can be spread across multiple staff positions as needed by the program.)

By making incremental changes to the values for number of matches in the 3 categories, adjustments can be made until the total FTE value is equal to the total FTE for program staff.



## Master List of Tasks and Time Estimates for Staffing Calculator

### MATCHING

Task Description	Task Estimates per Match (duration & frequency)
<p><b>Review mentor characteristics and matching criteria</b> - Information gathered on intake applications, notes from in-person interviews, etc. Task involves reviewing paperwork and making notes about key matching considerations.</p>	<p><b>Duration:</b> It is estimated that it might take between .25 and .5 hours to review the criteria about a mentor and compare that information to other potential mentors. Time estimate depends on the level of specificity a program applies to making matches.</p> <p><b>Frequency:</b> This task is likely only done 1 time per youth served during a year unless the program design intentionally makes multiple matches within a single year.</p>
<p><b>Review mentee characteristics, matching criteria, and parent preferences</b> - Information gathered on mentee applications, from parent or teacher referrals, personal conversations, and other records about the child's needs and personality. Task involves reviewing and considering this information.</p>	<p><b>Duration:</b> It is estimated that it might take between .25 and .5 hours to review a mentee's application, review any stated preferences from their parent, and to factor in other information about the child's needs and personality. Time estimate depends, in part, on the level of complexity of the child's needs.</p> <p><b>Frequency:</b> This task is likely only done 1 time per youth served during a year unless the program design intentionally makes multiple matches within a single year.</p>
<p><b>Make decision about match or place participants on waitlist</b> - Task involves reviewing all potential match options and selecting the best fit from the pool of mentors or deciding to place the child on a waitlist if no compatible mentors are available.</p>	<p><b>Duration:</b> It is estimated that this task would take between .25 and .5 hours, depending on the number of potential mentors for consideration and time spent determining the best fit.</p> <p><b>Frequency:</b> This task is likely only done 1 time per youth served during a year unless the program design intentionally makes multiple matches within a single year.</p>
<p><b>Inform mentee/parent of potential match</b> - Task involves either drafting and sending a letter or email or placing a phone call to inform the child and/or their parent about their potential match. Some information about the selected mentor may also be shared at this time.</p>	<p><b>Duration:</b> It is estimated that this task would take between .25 and 1.0 hours, depending on whether the notification is a simple email, a letter that needs to be mailed, or a personal phone call that may require several attempts at contact and varying levels of information sharing.</p> <p><b>Frequency:</b> This task is likely only done 1 time per youth served during a year unless the program design intentionally makes multiple matches within a single year.</p>

Task Description	Task Estimates per Match (duration & frequency)
<p><b>Inform mentor of potential match</b> - Task involves either drafting and sending a letter or email or placing a phone call to inform the mentor about their potential match. Some information about the selected youth/family may also be shared at this time.</p>	<p><b>Duration:</b> It is estimated that this task would take between .25 and 1.0 hours, depending on whether the notification is a simple email, a letter that needs to be mailed, or a personal phone call that may require several attempts at contact and varying levels of information sharing.</p> <p><b>Frequency:</b> This task is likely only done 1 time per youth served during a year unless the program design intentionally makes multiple matches within a single year.</p>
<p><b>Prepare mentee/parent for the first meeting</b> - This task involves providing the child and/or their parent or guardian with detailed information about the prospective mentor. This information can include basic demographic information, characteristics that might apply to the match, or other details that explain why the program thinks this person would be a good fit. This preparation will also include logistical details about when, where, and how the match will be confirmed and what might happen at their first meeting.</p>	<p><b>Duration:</b> It is estimated that this task would take between .5 and 1.5 hours depending on how much information is shared during the initial informing about the match and the complexity of the first formal match meeting where the relationship is confirmed. The more hands-on a program is about facilitating the first match meeting, the more information will need to be conveyed during this task. Allow for more time if this task will be handled through a personal phone call that might require several attempts at contact.</p> <p><b>Frequency:</b> This task is likely only done 1 time per youth served during a year unless the program design intentionally makes multiple matches within a single year.</p>
<p><b>Prepare mentor for the first meeting</b> - This task involves providing the prospective mentor with detailed information about the child and their family. This information can include basic demographic information, characteristics that might apply to the match, information about the child's needs, or other details that explain why the program thinks this youth would be a good fit. This preparation will also include logistical details about when, where, and how the match will be confirmed and what might happen at the first meeting.</p>	<p><b>Duration:</b> It is estimated that this task would take between .5 and 1.5 hours depending on how much information is shared during the initial informing about the match and the complexity of the first formal match meeting where the relationship is confirmed. The more hands-on a program is about facilitating the first match meeting, the more information will need to be conveyed during this task. Allow for more time if this task will be handled through a personal phone call that might require several attempts at contact.</p> <p><b>Frequency:</b> This task is likely only done 1 time per youth served during a year unless the program design intentionally makes multiple matches within a single year.</p>

Task Description	Task Estimates per Match (duration & frequency)
<p><b>Conduct first match meeting and get signed commitment forms</b> - This task will vary from program to program but mostly involves having a staff member facilitate an in-person meeting (usually at the program offices, the youth's school or home, or other location) where the match is introduced to each other, allowed to ask questions of each other, and express any final concerns about the match before committing to the match. This commitment often involves signing some form of match agreement or "contract" that outlines meeting times and frequency, goals for the match, ground rules for communication, and other details that will help the match moving forward. Occasionally these meetings even include an activity facilitated by the staff member to ease the getting-to-know-you process. Program rules and responsibilities are also reiterated at these initial meetings.</p>	<p><b>Duration:</b> It is estimated that this task will take between 0 and 2.0 hours depending on the role of program staff in attending and facilitating the initial meeting. Staff may also need time to prepare for an activity or gather information to share that has not been provided to participants previously. Programs where staff do not attend this first meeting should respond accordingly.</p> <p><b>Frequency:</b> This task is likely only done 1 time per youth served during a year unless the program design intentionally makes multiple matches within a single year.</p>
<p><b>Paperwork and other administrative tasks related to matching</b> - This task includes activities like developing a "case file" for the new match (either on paper or in a program database), gathering all relevant forms and matching worksheets, gathering and filing match commitment agreements, and any other data entry related to the establishment of the match.</p>	<p><b>Duration:</b> It is estimated that this task will take between .25 and .5 hours depending on the file structure of the program, the volume of the paperwork required by the program, and the complexity of the information captured during the matchmaking process.</p> <p><b>Frequency:</b> This task is likely only done 1 time per youth served during a year unless the program design intentionally makes multiple matches within a single year.</p>

## MONITORING AND SUPPORT (1<sup>st</sup> Year)

Task Description	Task Estimates per Match (duration & frequency)
<p><b>Check in with mentors discussing the topics recommended in the EEPM4</b> - This task consists of periodically checking in with mentors throughout the first year of the relationship. These check-ins are often conducted by phone or email, so programs should allow for multiple contact attempts when estimating the hours it would take to do this task once. Site-based programs may do these check-ins in-person when possible. These check-ins often solicit information about how the match has been going, activities the match has been engaged in, and specific progress or challenges within the match. These calls often also entail the provision of advice for the mentor on how to overcome challenges, but note that the offering of formal resources or deeper match support is covered below separately.</p>	<p><b>Duration:</b> This task is expected to take between .25 and 1.0 hours each time depending on the depth of the check-in and the amount of information tracked by the program and shared with the mentor. Please allow for multiple contact attempts when estimating hours, especially if these are done via phone.</p> <p><b>Frequency:</b> These check-ins are expected to happen, in most programs, 2 times in the first month and monthly thereafter, for a total of 13 check-ins per year. But some programs do check in more frequently depending on the intensity of the program and challenges within a match. Thus, this task is likely to happen 12-24 times per year in most community-based programs, while site based programs may only do this type of check-in monthly (12 times per year).</p>
<p><b>Log mentor check-ins in program database</b> - This task consists of entering information into the match case file or program database, detailing the topics of the conversation and any next steps.</p>	<p><b>Duration:</b> This task is expected to take between .1 and .25 hours each time depending on the depth of information collected.</p> <p><b>Frequency:</b> The frequency of this task should match the frequency of the actual check-ins noted above.</p>
<p><b>Check in with mentees discussing the topics recommended in the EEPM4</b> - This task consists of periodically checking in with youth throughout the first year of the relationship. In some instances, the parent or guardian is contacted instead of the child (note that those conversations are tracked separately below). These check-ins often solicit information about how the match has been going, activities the match has been engaged in, and specific progress or challenges within the match. These calls often also entail the provision of advice for the mentee on how to overcome challenges, but note that the offering of formal resources or deeper match support is covered below separately.</p>	<p><b>Duration:</b> This task is expected to take between .25 and 1.0 hours each time depending on the depth of information collected and topics discussed. Please allow for multiple contact attempts when estimating hours, especially if these are done via phone.</p> <p><b>Frequency:</b> This task may be done less frequently than mentor check-ins in some programs, or not at all. Programs are encouraged to check in with youth at least occasionally throughout the first year, so the estimated frequency of this task is between 4 (quarterly) and 12 (monthly) times per year, although some programs could do this several times per month depending on the intensity of the program.</p>
<p><b>Log mentee check-ins in program database</b> - This task consists of entering information into the match case file or program database, detailing the topics of the conversation and any next steps.</p>	<p><b>Duration:</b> This task is expected to take between .1 and .25 hours each time depending on the depth of information collected.</p> <p><b>Frequency:</b> The frequency of this task should match the frequency of the actual check-ins noted above.</p>

Task Description	Task Estimates per Match (duration & frequency)
<p><b>Check in with parents discussing the topics recommended in the EEPM4</b> - This task consists of periodically checking in with parents/guardians of mentees to gauge their perceptions of the relationship throughout the first year. These check-ins often solicit information about how the match has been going, activities the match has been engaged in, and specific progress or challenges within the match. These calls often also entail the provision of advice for the parent on how to overcome (or help their child overcome) relationship challenges, but note that the offering of formal resources or deeper match support is covered below separately.</p>	<p><b>Duration:</b> This task is expected to take between .25 and 1.0 hours each time depending on the depth of information collected. Please allow for multiple contact attempts when estimating hours, especially if these are done via phone.</p> <p><b>Frequency:</b> This task may be done less frequently than mentor check-ins in some programs, or not at all. Programs are encouraged to check in with parents at least occasionally throughout the first year, so the estimated frequency of this task is between 4 (quarterly) and 12 (monthly) times per year, although some programs could do this several times per month depending on the intensity of the program.</p>
<p><b>Log parent check-ins in program database</b> - This task consists of entering information into the match case file or program database, detailing the topics of the conversation and any next steps.</p>	<p><b>Duration:</b> This task is expected to take between .1 and .25 hours each time depending on the depth of information collected.</p> <p><b>Frequency:</b> The frequency of this task should match the frequency of the actual check-ins noted above.</p>
<p><b>Check in with other stakeholders (teachers, coaches, parole, etc.) in the match discussing the topics recommended in the EEPM4</b> - This task consists of periodically checking in with other stakeholders in the match, such as a teacher who referred a student to a school-based program or a parole officer who may be monitoring the progress of a juvenile-justice involved youth. As with other check-ins, these may be designed to solicit information about how the match is going, but these stakeholders may also simply be informed by the program as to how the match is progressing and any positive changes in the mentee.</p>	<p><b>Duration:</b> This task is expected to take between .25 and 1.0 hours each time depending on the depth of information collected and topics discussed.</p> <p><b>Frequency:</b> The expected frequency of this task is between 0 and 6 times per year. Some programs may do this more frequently depending on the role of these other stakeholders.</p>
<p><b>Log other stakeholder check-ins in program database</b> - This task consists of entering information into the match case file or program database, detailing the topics of the conversation and any next steps.</p>	<p><b>Duration:</b> This task is expected to take between .1 and .25 hours each time depending on the depth of information collected.</p> <p><b>Frequency:</b> The frequency of this task should match the frequency of the actual check-ins noted above.</p>

Task Description	Task Estimates per Match (duration & frequency)
<p><b>Review check-in history looking for safety concerns or trends in the relationship quality; can also include reviewing and discussing case files with other program staff</b> - This task consists of periodically reviewing the recent check-in notes from all participants and looking for red-flags related to child safety, signs of progress/improvement on the part of the mentee, or indicators of the quality of the relationship between the mentor and the youth. This task involves the purposeful and planned review of match notes and case files with an eye on safety and quality.</p>	<p><b>Duration:</b> This task is expected to take between .25 and .5 hours each time it is done. The time estimate is dependent on the volume and complexity of information being reviewed.</p> <p><b>Frequency:</b> Programs can choose to do this as often as needed depending on their risk management policies and attention on match health. A typical frequency would be between 2 and 4 times per year.</p>
<p><b>Sharing resources, advice, and solutions to relationship challenges/opportunities with mentors</b> - This task consists of responding to match challenges by finding and sharing informational resources, offering advice and counselling, providing suggestions on match activities, discussing communication strategies, or providing tools or techniques that can support individual matches. Please note that ongoing mentor training provided at the group level is tracked on a separate tab.</p>	<p><b>Duration:</b> This task may take between .25 and 1.0 hours each time it is provided, depending on the depth or complexity of the issues being addressed and whether the support is one-time or if follow-up is needed.</p> <p><b>Frequency:</b> Some matches may not need much in the way of this deeper support at all over there first year, but some matches may need this level of support fairly often as they work through initial challenges in the match. Chances are most matches will need some support like this in their first year. Thus, estimates for frequency range between 1 and 6 times per year for most first-year matches.</p>
<p><b>Sharing resources, advice, and solutions to relationship challenges/opportunities with mentees/parents</b> - This task consists of responding to match challenges by finding and sharing informational resources, offering advice and counselling, providing suggestions on match activities, discussing communication strategies, or providing tools or techniques that can support individual matches. Please note that ongoing mentee or parent training provided at the group level is tracked on a separate tab.</p>	<p><b>Duration:</b> This task may take between .25 and 1.0 hours each time it is provided, depending on the depth or complexity of the issues being addressed and whether the support is one-time or if follow-up is needed.</p> <p><b>Frequency:</b> Some matches may not need much in the way of this deeper support at all over there first year, but some matches may need this level of support fairly often as they work through initial challenges in the match. Chances are most matches will need some support like this in their first year. Thus, estimates for frequency range between 1 and 6 times per year for most first-year matches.</p>
<p><b>Periodically assessing whether the match should be closed</b> - This task consists of examining the overall health and trend of a match and making a determination as to whether it should be considered for closure or not. Be sure not to double count hours here if you included this task as part of the review of check-in history above.</p>	<p><b>Duration:</b> This task is expected to take between .1 and .2 hours each time it is done. The time estimate is dependent on the volume and complexity of information being reviewed.</p> <p><b>Frequency:</b> Programs can choose to do this as often as needed, but it is often done as part of overall case review. Thus, the expected frequency here should match the frequency noted above for "review check-in history."</p>

Task Description	Task Estimates per Match (duration & frequency)
<p><b>Administering relationship quality assessments to mentors, youth, and parents/guardians</b> – This task consists of administering surveys to mentors, youth, and their parents or guardians (or other stakeholders in the match) to assess their perceptions of the quality of the match. The task involves getting the surveys to each individual, reminding them to complete the survey, gathering completed surveys, and entering survey results into the program database and reviewing the results.</p>	<p><b>Duration:</b> This task is expected to take between .5 and 1.5 hours per match each time it is done depending on the number of survey respondents, the number of contacts needed to disseminate and collect completed surveys, and the way that data will be entered into the program’s database and reviewed by the match support staff.</p> <p><b>Frequency:</b> This task is one that is likely done only once per year per match in an attempt to understand how the relationship is going and uncover opportunities for additional support by the program. The expected frequency is thus 1 time per year per match.</p>

## MONITORING AND SUPPORT (ongoing matches of 1+ year duration)

Task Description	Task Estimates per Match (duration & frequency)
<p><b>Check in with mentors discussing the topics recommended in the EEP4 –</b> This task consists of periodically contacting mentors in longer-term matches. These check-ins are often conducted by phone or email, so programs should allow for multiple contact attempts when estimating the hours it would take to do this task once. Site-based programs may do these check-ins in-person when possible. These check-ins often solicit information about how the match has been going, activities the match has been engaged in, and specific progress or challenges within the match. These calls often also entail the provision of advice for the mentor on how to overcome challenges, but note that the offering of formal resources or deeper match support is covered below separately.</p>	<p><b>Duration:</b> This task is expected to take between .25 and .5 hours each time depending on the depth of the check-in and the amount of information tracked by the program and shared with the mentor. Please allow for multiple contact attempts when estimating hours, especially if these are done via phone.</p> <p><b>Frequency:</b> In many programs, strong matches that have been together for long periods of time (beyond the original commitment) evolve to a place where staff checks in with them less frequently. Thus, this task is likely to happen 6-12 times per year in most community-based programs, while site based programs may often only do this 3 or 4 times.</p>
<p><b>Log mentor check-ins in program database -</b> This task consists of entering information into the match case file or program database, detailing the topics of the conversation and any next steps.</p>	<p><b>Duration:</b> This task is expected to take between .1 and .25 hours each time depending on the depth of information collected.</p> <p><b>Frequency:</b> The frequency of this task should match the frequency of the actual mentor check-ins noted above.</p>
<p><b>Check in with mentees discussing the topics recommended in the EEP4 -</b> This task consists of periodically checking in with youth throughout their ongoing, long-term relationship. In some instances, the parent or guardian is contacted instead of the child (note that those conversations are tracked separately below). These check-ins often solicit information about how the match has been going, activities the match has been engaged in, and specific progress or challenges within the match. These calls often also entail the provision of advice for the mentee on how to overcome challenges, but note that the offering of formal resources or deeper match support is covered below separately.</p>	<p><b>Duration:</b> This task is expected to take between .25 and .5 hours each time depending on the depth of information collected and topics discussed. Please allow for multiple contact attempts when estimating hours, especially if these are done via phone.</p> <p><b>Frequency:</b> This task may be done less frequently than mentor check-ins in some programs, or not at all. Programs are encouraged to check in with youth several times throughout the year. A typical frequency in many programs would be 3 or 4 times per year, although some programs could do this much more frequently depending on the intensity of the program.</p>
<p><b>Log mentee check-ins in program database -</b> This task consists of entering information into the match case file or program database, detailing the topics of the conversation and any next steps.</p>	<p><b>Duration:</b> This task is expected to take between .1 and .25 hours each time depending on the depth of information collected.</p> <p><b>Frequency:</b> The frequency of this task should match the frequency of the actual mentee check-ins noted above.</p>



Task Description	Task Estimates per Match (duration & frequency)
<p><b>Check in with parents discussing the topics recommended in the EEPM4</b> - This task consists of periodically checking in with parents/guardians of mentees to gauge their perceptions of the relationship beyond the first year. These check-ins often solicit information about how the match has been going, activities the match has been engaged in, and specific progress or challenges within the match. These calls often also entail the provision of advice for the parent on how to overcome (or help their child overcome) relationship challenges, but note that the offering of formal resources or deeper match support is covered below separately.</p>	<p><b>Duration:</b> This task is expected to take between .25 and .5 hours each time depending on the depth of information collected. Please allow for multiple contact attempts when estimating hours, especially if these are done via phone.</p> <p><b>Frequency:</b> This task may be done less frequently than mentor check-ins in some programs, or not at all. Programs are encouraged to check in with parents at least occasionally throughout the relationship, regardless of how long it has lasted. An estimated frequency of this task is between 2 and 4 (quarterly) times per year, although some programs could do this much more frequently depending on the intensity and setting of the program.</p>
<p><b>Log parent check-ins in program database</b> - This task consists of entering information into the match case file or program database, detailing the topics of the conversation and any next steps.</p>	<p><b>Duration:</b> This task is expected to take between .1 and .25 hours each time depending on the depth of information collected.</p> <p><b>Frequency:</b> The frequency of this task should match the frequency of the actual parent check-ins noted above.</p>
<p><b>Check in with other stakeholders (teachers, coaches, parole, etc.) in the match discussing the topics recommended in the EEPM4</b> - This task consists of periodically checking in with other stakeholders in the match, such as a teacher who referred a student to a school-based program or a parole officer who may be monitoring the progress of a juvenile-justice involved youth. As with other check-ins, these may be designed to solicit information about how the match is going, but these stakeholders may also simply be informed by the program as to how the match is progressing and any positive changes in the mentee.</p>	<p><b>Duration:</b> This task is expected to take between .25 and .5 hours each time depending on the depth of information collected and topics discussed.</p> <p><b>Frequency:</b> The expected frequency of this task is between 0 and 4 times per year. Some programs may do this much more frequently depending on the role of these other stakeholders.</p>
<p><b>Log other stakeholder check-ins in program database</b> - This task consists of entering information into the match case file or program database, detailing the topics of the conversation and any next steps.</p>	<p><b>Duration:</b> This task is expected to take between .1 and .25 hours each time depending on the depth of information collected.</p> <p><b>Frequency:</b> The frequency of this task should match the frequency of the actual stakeholder check-ins noted above.</p>
<p><b>Review check-in history looking for safety concerns or trends in the relationship quality; can also include reviewing and discussing case files with other program staff</b> - This task consists of periodically reviewing the recent check-in notes from all participants and looking for red-flags related to child safety, signs of progress/improvement on the part of the mentee, or indicators of the quality of the relationship between the mentor and the youth. This task involves the purposeful and planned review of match notes and case files with an eye on safety and quality.</p>	<p><b>Duration:</b> This task is expected to take between .25 and .5 hours each time it is done. The time estimate is dependent on the volume and complexity of information being reviewed.</p> <p><b>Frequency:</b> This is a task that may dissipate once a match reaches some level of maturity and self-guidance. Programs can choose to do this as often as needed depending on their risk management policies and attention on long-term match health. A typical frequency would be between 1 and 4 times per year.</p>

Task Description	Task Estimates per Match (duration & frequency)
<p><b>Sharing resources, advice, and solutions to relationship challenges/opportunities with mentors</b> - This task consists of responding to match challenges by finding and sharing informational resources, offering advice and counselling, providing suggestions on match activities, discussing communication strategies, or providing tools or techniques that can support individual matches. Please note that ongoing mentor training provided at the group level is tracked on a separate tab.</p>	<p><b>Duration:</b> This task may take between .25 and 1.0 hours each time it is provided, depending on the depth or complexity of the issues being addressed and whether the support is one-time or if follow-up is needed.  <b>Frequency:</b> While mentors can run into many challenges well into their mentoring relationships, for many matches, the intensity of this kind of support will dissipate as their relationship matures. Thus, estimates for frequency range between 1 and 4 times per year for most long-term matches.</p>
<p><b>Sharing resources, advice, and solutions to relationship challenges/opportunities with mentees/parents</b> - This task consists of responding to match challenges by finding and sharing informational resources, offering advice and counselling, providing suggestions on match activities, discussing communication strategies, or providing tools or techniques that can support individual matches. Please note that ongoing mentee or parent training provided at the group level is tracked on a separate tab.</p>	<p><b>Duration:</b> This task may take between .25 and 1.0 hours each time it is provided, depending on the depth or complexity of the issues being addressed and whether the support is one-time or if follow-up is needed.  <b>Frequency:</b> While youth's needs can change over time and relationship challenges are always a possibility, the intensity of this kind of support will dissipate over time for many youth as their relationship matures. Thus, estimates for frequency range between 1 and 4 times per year for most long-term matches.</p>
<p><b>Periodically assessing whether the match should be closed</b> - This task consists of examining the overall health and trend of a match and making a determination as to whether it should be considered for closure or not. Be sure not to double count hours here if you included this task as part of the review of check-in history above.</p>	<p><b>Duration:</b> This task is expected to take between .1 and .2 hours each time it is done. The time estimate is dependent on the volume and complexity of information being reviewed.  <b>Frequency:</b> Programs can choose to do this as often as needed, but it is often done as part of overall case review. Thus, the expected frequency here should match the frequency noted above for "review check-in history."</p>
<p><b>Administering relationship quality assessments to mentors, youth, and parents/guardians</b> – This task consists of administering surveys to mentors, youth, and their parents or guardians (or other stakeholders in the match) to assess their perceptions of the quality of the match. The task involves getting the surveys to each individual, reminding them to complete the survey, gathering completed surveys, and entering survey results into the program database and reviewing the results.</p>	<p><b>Duration:</b> This task is expected to take between .5 and 1.5 hours per match each time it is done depending on the number of survey respondents, the number of contacts needed to disseminate and collect completed surveys, and the way that data will be entered into the program's database and reviewed by the match support staff.  <b>Frequency:</b> This task is one that is likely done only once per year per match in an attempt to understand how the relationship is going and uncover opportunities for additional support by the program. The expected frequency is thus 1 time per year (per match).</p>

## EXTRAORDINARY MATCH SUPPORT

Task Description	Task Estimates per Match (duration & frequency)
<p><b>Referral of youth, parents, or mentors to other services</b> – This task involves providing information to program participants that makes them aware of or helps them access other interventions, services, programs, and supports in the community. These referrals can be informal information provision to a participant or an official referral that is tracked by your program and another organization. Include here any referrals to other services or supports within any parent organization that your mentoring program might be a part of.</p>	<p><b>Duration:</b> This task may be as simple as sending an email or handing a flier to a parent or as complicated as searching for an appropriate resource to help a mentor or family with a specific challenge. This may be an official referral that requires detailed paperwork or other explicit information sharing with another provider. Thus, an estimated average range for referrals might be between .25 and 1.0 hours per referral, depending on the nature and complexity of the referral the program is making. Some programs may make referrals that go beyond even this time estimate.</p> <p><b>Frequency:</b> Not every participant in your program will need a referral such as this each and every year. Consider the percentage of your youth or mentors that might need such a referral in a given year and the total volume of those referrals over the course of the year. This number may vary considerably depending on the severity of need or desire for additional support among your participants.</p>
<p><b>Advocacy for youth in institutional setting</b> – This task involves having a staff member represent a mentee in an institutional context, such as attending family court, attending a teacher conference, or meeting with a probation officer or medical professional. Programs may also include time spent preparing mentors to serve as formal advocates in these types of settings, provided that that preparation is not already included on the monitoring and support or ongoing training tabs.</p>	<p><b>Duration:</b> This task may take considerable time depending on the complexity of the situation and the details of the context. Because this advocacy often involves an in-person meeting, an estimated range of time might be between 1.0 and 4.0 hours for each instance, depending on the context.</p> <p><b>Frequency:</b> Not every youth in your program will need this level of support over the course of the year, and many may not need it more than one or two times. Consider the percentage of youth in your program that may need this kind of advocacy in a given year and the total volume of instances of your staff providing this kind of support.</p>

Task Description	Task Estimates per Match (duration & frequency)
<p><b>Conflict resolution or other intensive match problem-solving</b> – This task involves providing a match with intensive support to address a problem or serious challenge within the relationship. While rare, these instances often involve a program staff person acting as an intermediary to resolve an issue or disagreement involving some combination of the parent, the youth, the mentor, and even a staff member themselves. This may involve a series of conversations, either in-person or over the phone, or even a group meeting where all parties are brought together in an attempt to resolve the conflict or find solutions to an issue.</p>	<p><b>Duration:</b> This task may take considerable time depending on the complexity of the situation and the details of the context. Because this type of match support often involves in-person meetings, an estimated range of time might be between 1.0 and 4.0 hours for each instance, depending on the context and nature of the conflict.</p> <p><b>Frequency:</b> Not every match in your program will need this level of intervention and targeted intensive support over the course of the year, and many may not need it more than one or two times. Consider the percentage of matches in your program that may need this kind of hands-on engagement in a given year and the total volume of instances of your staff providing this kind of support.</p>

## ONGOING TRAINING AND GROUP ACTIVITIES

Task Description	Task Estimates per Event (duration & frequency)
<p><b>Development of ongoing training opportunities for mentors</b> – This task involves preparing all aspects of ongoing training sessions for mentors. This type of training is often delivered throughout the course of the year for small or large groups of mentors, usually around a topical theme each time. Specific details of this task include identifying and reviewing training curricula, securing meeting space and refreshments, sending out invitations, and other logistics related to planning for each training.</p>	<p><b>Duration:</b> Given the wide variety of tasks here, an estimated time range for this task would be between 1.0 and 4.0 hours, depending on the complexity of the training, the number of attendees, and whether the training is new or a repeated topic.</p> <p><b>Frequency:</b> This type of training is often provided at various points throughout the year. An expected frequency for this task is between 1 and 12 times per year, although most programs choose to offer this type of ongoing training quarterly, or 4 times per year.</p>
<p><b>Delivery of ongoing training opportunities for mentors</b> – This task involves the actual delivery of the ongoing mentor training described above on the day of the event.</p>	<p><b>Duration:</b> Most of these trainings are designed to be short and focused on one key topic. They are often delivered in the evenings or on weekends to maximize attendance. An estimated range is 1.0 to 4.0 hours for each training, depending on the topic and setting.</p> <p><b>Frequency:</b> As noted in the planning section, most programs will conduct these trainings between 1 and 12 times per year.</p>
<p><b>Development of ongoing training opportunities for mentees/parents</b> - This task involves preparing all aspects of ongoing training sessions for mentees and/or their parents. This type of training is often delivered throughout the course of the year for small or large groups of participants, usually around a topical theme each time. Specific details of this task include identifying and reviewing training curricula, securing meeting space and refreshments, sending out invitations, and other logistics related to planning for each training.</p>	<p><b>Duration:</b> Given the wide variety of tasks here, an estimated time range for this task would be between 1.0 and 4.0 hours, depending on the complexity of the training, the number of attendees, and whether the training is new or a repeated topic.</p> <p><b>Frequency:</b> Programs may offer this type of ongoing training less frequently to youth and parents than they do mentors, but most will offer a few of these trainings throughout the year. Thus, an estimated frequency might be between 1 and 6 times per year, although some programs might offer this even more frequently.</p>
<p><b>Delivery of ongoing training opportunities for mentees/parents</b> - This task involves the actual delivery of the ongoing mentee or parent training described above on the day of the event.</p>	<p><b>Duration:</b> Most of these trainings are designed to be short and focused on one key topic. They are often delivered in the evenings or on weekends to maximize attendance. An estimated range is 1.0 to 4.0 hours for each training, depending on the topic and setting.</p> <p><b>Frequency:</b> As noted in the planning section, most programs will conduct these trainings between 1 and 6 times per year.</p>

Task Description	Task Estimates per Event (duration & frequency)
<p><b>Planning group outings for matches and/or youth and families</b> – This task involves planning for one or more group outings throughout the year. Typical examples of this include planning a picnic for all matches and parents, arranging for matches to attend a sporting event or movie together, or planning for matches to tour potential colleges and universities together. Specific activities within this task include securing tickets or access to an event, arranging transportation, and getting parent permission for any travel. Note that end-of-year ceremonies for matches are calculated separately below.</p>	<p><b>Duration:</b> Given the wide variety of tasks here, an estimated time range for this task would be between 1.0 and 4.0 hours, depending on the complexity of the outing. Note that for larger events, multiple staff may be involved in planning this. Since the goal here is total hours per event, include multiple staff members’ time if appropriate.</p> <p><b>Frequency:</b> These types of outings vary considerably in terms of their frequency. Some programs may not do this at all, while others may have monthly outings or more. In many programs, some kind of outing 2-4 times per year is typical.</p>
<p><b>Leading group outings for matches and/or youth and families</b> – This task involves actually leading or facilitating the aforementioned group outings for matches and/or youth and families. This may involve multiple staff members helping out on the day or evening of the event.</p>	<p><b>Duration:</b> These events could be a simple 1 or 2 hour trip or a day-long event or more (1.0 to 8.0 hours). Think carefully about the types of events you offer and estimate how much staff time is provided during the events themselves, including things like travel and transportation of participants. Note that for larger events, multiple staff may be involved in planning this. Since the goal here is total hours per event, include multiple staff members’ time if appropriate.</p> <p><b>Frequency:</b> Use the frequency noted above for the planning of these events.</p>
<p><b>Other social gatherings for mentors or youth/families</b> – This task refers to other small events or gatherings that you may offer to mentors, youth, or parents. For example, you might offer a monthly mentor “night out” where mentors can meet and seek advice from each other in a relaxed social setting. Or you may offer brief workshops for parents on topics of interest to them. This can include any other time spent bringing program participants together during the year. Be sure not to double count any group outings accounted for above here.</p>	<p><b>Duration:</b> Include both planning and delivery time in this total. Estimates range from 1.0 to 4.0 hours (perhaps more) depending on the nature and complexity of the event or gathering. Since the goal here is total hours per event, include multiple staff members’ time if appropriate.</p> <p><b>Frequency:</b> The frequency of these will vary widely from program to program. An estimated range is between 0 and 12 times per year (monthly).</p>
<p><b>Planning formal group activities for matches</b> – In some programs, the staff in charge of mentor monitoring and supervision also play a bigger role in the mentoring time by leading or facilitating group activities for matches. This is typically more common in site-based or group mentoring programs, especially those that utilize a formal curriculum. This task involves identifying curriculum, gathering needed supplies and materials, arranging refreshments, and securing meeting space. Note that this task is not about planning for group outings as described above, but rather planning the actual activities that mentors and mentees do when they are together.</p>	<p><b>Duration:</b> An estimated range for planning a match activity for a group would be between 1.0 and 4.0 hours, depending on the complexity and amount of facilitator prep time needed.</p> <p><b>Frequency:</b> In programs where staff play this role, this could occur almost every time matches meet throughout the year. In other programs, this may be something that staff does only a few times per year, or not at all. An estimated range is between 0 and 24 times per year.</p>

Task Description	Task Estimates per Event (duration & frequency)
<p><b>Conducting formal group activities for matches</b> – This task involves conducting the group match activities noted above.</p>	<p><b>Duration:</b> This task should last as long as the staff member’s role in delivering the activity, plus set-up and wrap-up time. An estimated range is between 1.0 and 4.0 hours, perhaps more depending on the length of the match meetings.</p> <p><b>Frequency:</b> This frequency should match that of the planning of the activities noted directly above.</p>
<p><b>Planning an end-of-year ceremony or celebration event</b> – This task involves planning a special end-of year or ending match ceremony for participants. In some programs, it’s common to have a celebration ceremony for all matches; in others, this is done periodically as matches dissolve over time. But most programs do offer some form of “graduation” party, commitment celebration, or end-of-year recognition event. Specific tasks here include securing space for the event, purchasing food and beverages, making or ordering awards or tokens of appreciation for participants, and arranging transportation or other event logistics.</p>	<p><b>Duration:</b> This task can have a lot of moving parts and multiple staff members playing a role in planning the big event. An estimated range is between 2.0 and 8.0 hours (or more) of time to fully plan the event. Since the goal here is total hours per event, include multiple staff members’ time if appropriate.</p> <p><b>Frequency:</b> This type of event is expected to happen only one per year in most programs, but some programs may do this quarterly or monthly if matches end at various points during the year. Estimated frequency is between 1 and 4 times per year.</p>
<p><b>Delivering an end-of-year ceremony or celebration event</b> – This task involves leading the ceremony or event planned above.</p>	<p><b>Duration:</b> These events typically last from 1.0 to 4.0 hours, depending on the program. So use that as a guide and add set-up and clean-up time, as well. Since the goal here is total hours per event, include multiple staff members’ time if appropriate.</p> <p><b>Frequency:</b> This frequency should match that of the planning of the event noted directly above.</p>

## MATCH CLOSURE

Task Description	Task Estimates per Match (duration & frequency)
<p><b>Inform mentor that the match is closing</b> – This task involves reaching out to the mentor to inform them that their match will be closing. This may be triggered by the child leaving the program or by your staff terminating a match that is no longer working or meeting as needed. This task involves discussing the reasons for the match ending and the next steps in the closure process. Even in programs where matches close at a predictable and known time, there should still be some formal communication with the mentor.</p>	<p><b>Duration:</b> This task often involves a phone call or preparation and sending of a formal written letter or email. Allow for multiple contact attempts if conducted via phone. An estimated range for this task is .5 and 1.0 hours.  <b>Frequency:</b> This task will likely only happen once per year per match as the mentor’s initial relationship comes to a close. Thus, the estimated frequency of this activity is 1 time per year, perhaps 2 if the mentor was rematched at some point during the same year.</p>
<p><b>Inform mentee/parent that the match is closing</b> – This task involves reaching out to the youth or their parent to inform them that their match will be closing. This may be triggered by the mentor leaving the program or by your staff terminating a match that is no longer working or meeting as needed. This task involves discussing the reasons for the match ending and the next steps in the closure process. Even in programs where matches close at a predictable and known time, there should still be some formal communication with the mentee and their parent or guardian.</p>	<p><b>Duration:</b> This task often involves a phone call or preparation and sending of a formal written letter or email. Allow for multiple contact attempts if conducted via phone. An estimated range for this task is .5 and 1.0 hours.  <b>Frequency:</b> This task will likely only happen once per year as the mentee’s initial relationship comes to a close. Thus, the estimated frequency of this activity is 1 time per year, perhaps 2 if the mentee was rematched at some point during the same year.</p>
<p><b>Arrange a final match meeting for the mentor and mentee</b> – In many programs, staff will make some preparations for a final meeting between the mentor and the mentee to close out their relationship. In some programs, this final meeting may be facilitated by the staff member, while in others, the mentor is free to arrange and participate in a final outing with their mentee. But even in those circumstances, it is not uncommon for the staff member to suggest topics to discuss or to provide a protocol or suggested activity. Time spent on any similar tasks should be calculated here.</p>	<p><b>Duration:</b> The time needed for this will vary from program to program, but an estimated range is between .5 and 1.0 hours to arrange a final match meeting, per match that closes.  <b>Frequency:</b> The estimated frequency of this activity is 1 time per year per match that closes; perhaps 2 if the mentor was rematched at some point during the same year.</p>
<p><b>Gather and share match “mementoes” and other documentation with mentor/mentee/parent</b> – This increasingly common task involves preparing various keepsakes, photos, quotes, art projects, and any other meaningful items or information that can be shared with matches at time of closure. Many programs keep track of these types of mementoes throughout the year for this purpose.</p>	<p><b>Duration:</b> This task could take between .25 and 1.0 hours depending on the volume of material shared, assuming the program does this at all.  <b>Frequency:</b> The estimated frequency of this activity is 1 time per year per match that closes; perhaps 2 if the mentor was rematched at some point during the same year.</p>



Task Description	Task Estimates per Match (duration & frequency)
<p><b>Discuss closure with mentor using the topics in the EEPM4</b> – This task involves having a purposeful discussion with the mentor about the specific topics mentioned in the EEPM4 around closure discussions (e.g., feelings about closure, rules around future contact, etc.).</p>	<p><b>Duration:</b> This task can involve some meaningful dialogue and can allow participants to process the closure experience properly. An estimated time for this task is between .5 and 1.0 hours per mentor.</p> <p><b>Frequency:</b> The estimated frequency of this activity is 1 time per year per match that closes; perhaps 2 if the mentor was rematched at some point during the same year.</p>
<p><b>Discuss closure with mentee using the topics in the EEPM4</b> - This task involves having a purposeful discussion with the mentee about the specific topics mentioned in the EEPM4 around closure discussions (e.g., feelings about closure, rules around future contact, etc.).</p>	<p><b>Duration:</b> This task can involve some meaningful dialogue and can allow participants to process the closure experience properly. An estimated time for this task is between .5 and 1.0 hours per mentee.</p> <p><b>Frequency:</b> The estimated frequency of this activity is 1 time per year per match that closes; perhaps 2 if the mentee was rematched at some point during the same year.</p>
<p><b>Discuss closure with parent using the topics in the EEPM4</b> - This task involves having a purposeful discussion with the parent or guardian about the specific topics mentioned in the EEPM4 around closure discussions (e.g., feelings about closure, rules around future contact, etc.).</p>	<p><b>Duration:</b> This task can involve some meaningful dialogue and can allow participants to process the closure experience properly. An estimated time for this task is between .5 and 1.0 hours per parent.</p> <p><b>Frequency:</b> The estimated frequency of this activity is 1 time per year per match that closes; perhaps 2 if the parent’s child was rematched at some point during the same year.</p>
<p><b>Get written confirmation of match closure and future contact policy from mentor</b> – This task involves getting a signed copy of your program’s closure and future contact policies/rules/procedures from mentors as their relationship ends. This task may be conducted at the final match meeting or ceremony if that is facilitated by a staff member. Or, this might involve contacting the mentor via phone or email and arranging to get the signed documentation returned.</p>	<p><b>Duration:</b> This task may only take a few minutes if done in-person at a final meeting. Or it might take multiple attempts and mailings to get the confirmation needed from a participant. An estimated range is between .25 and .5 hours per mentor at the time of closure.</p> <p><b>Frequency:</b> The estimated frequency of this activity is 1 time per year per match that closes; perhaps 2 if the mentor was rematched at some point during the same year.</p>
<p><b>Get written confirmation of match closure and future contact policy from mentee/parent</b> - This task involves getting a signed copy of your program’s closure and future contact policies/procedures from parents or guardians as their child’s relationship ends. This task may be conducted at the final match meeting or ceremony if that is facilitated by a staff member. Or, this might involve contacting the parent via phone or email and arranging to get the signed documentation returned.</p>	<p><b>Duration:</b> This task may only take a few minutes if done in-person at a final meeting. Or it might take multiple attempts and mailings to get the confirmation needed from a participant. An estimated range is between .25 and .5 hours per mentor at the time of closure.</p> <p><b>Frequency:</b> The estimated frequency of this activity is 1 time per year per match that closes; perhaps 2 if the parent’s child was rematched at some point during the same year.</p>

Task Description	Task Estimates per Match (duration & frequency)
<p><b>Conduct closure ceremony or ritual (assuming there is not a final meeting)</b>  – In some programs, a staff member facilitates a final match meeting where the mentor and youth have a chance to say goodbye and rules around future contact are clarified. <u>Please do not calculate hours here that may have been accounted for in previous tasks listed in this section.</u> However, if staff do often facilitate these closure meetings or ceremonies directly, that time should be allocated here.</p>	<p><b>Duration:</b> These types of meetings are estimated to take between 1.0 and 2.0 hours per match that is closing.  <b>Frequency:</b> The estimated frequency of this activity is 1 time per year per match that closes; perhaps 2 if the mentor was rematched at some point during the same year.</p>
<p><b>Document completion of closure procedure and formally close match in program database</b> – This task involves systematically entering the information gathered at the match closure meeting, the signed copies of paperwork, and any other official documentation of closure into the program’s database or filing system. All tasks related to the recordkeeping around match closure should be calculated here, including archiving and off-site storage of physical records.</p>	<p><b>Duration:</b> Because this task often involves a fair amount of paperwork and procedures to offset risk management concerns, the estimated time for this task is .5 to 1.0 hours per match that closes per year.  <b>Frequency:</b> The estimated frequency of this activity is 1 time per year per match that closes; perhaps 2 if the mentor was rematched at some point during the same year.</p>

## ADMINISTRATIVE TASKS

Task Description	Task Estimates per Employee (duration & frequency)
<p><b>Ongoing training and professional development for match support</b></p>	<p><b>Duration:</b> It is expected that most staff who oversee matches will need some level of professional development over the course of a typical year. Think about the volume of ongoing training and professional development they might need. Estimates for this may range between 2.0 (a workshop) and 16.0 hours (a few days at a conference) of professional development time per year per employee who supports matches. Since the goal here is total hours per year, include multiple staff members' time if appropriate.</p> <p><b>Frequency:</b> This may be offered only once per year or multiple times. An estimated range is between 1 and 4 professional development opportunities per year.</p>
<p><b>Attending general staff meetings</b></p>	<p><b>Duration:</b> Staff meetings typically last between .5 and 2.0 hours. Do not include meetings that are for activities calculated elsewhere, such as discussing match case files or planning for events.</p> <p><b>Frequency:</b> An estimated range is between 12 times (monthly) and 24 times per year (biweekly), if not more frequently depending on the program.</p>