



**Final Report on the Enhanced School-Based Mentoring Pilot:  
Developing and Substantiating An Evidence-Based Model**

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**Big Brothers Big Sisters of America**

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BBBS of Central Arkansas

BBBS of the North Bay

Nutmeg BBBS

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BBBS of Greater Miami & Mentoring Resource Center

BB/BS of Kentuckiana

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BBBS of Central New Mexico

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**In** 2003, when School-Based Mentoring (SBM) was still a very new program, Big Brothers Big Sisters of America (BBBSA) undertook an impact study. Though SBM had already become an effective way to reach new and greater numbers of children, the study found that the impacts on youth, while positive, were largely not sustained after the first year. BBBSA and a group of dedicated agencies have spent the past three years revising, testing, and further refining the SBM model. This effort sought to lengthen school-based matches in order to achieve longer-lasting impacts on youth. The new model successfully lengthened matches: the rate of carryover into a second school year was 56% in the pilot, compared to 40% in the impact study. In addition, the average 12-month retention rate in the pilot was 48.2%, compared to 35.8% network wide. In addition, we found that these matches had positive impacts for youth in the following areas: youth-reported social acceptance, scholastic efficacy, academic performance, presence of special adult, as well as teacher-reported classwork quality, academic functioning, and social acceptance.

## Development and Growth of School-Based Mentoring

In 1999, school-based programs comprised only 23% (~27,000 youth) of BBBS's total children served. Beginning in 2000, School-Based Mentoring became a driver of growth throughout the Big Brothers Big Sisters (BBBS) network, and focused efforts began to scale up SBM. These efforts changed the mix of network programming, so that by 2004 approximately 50% of matches were school-based. In light of its rapid growth, BBBSA made it a priority to take stock of the efficacy of SBM through an impact study conducted in 2003 (see below for detail). In the years during and since the impact study, the percentage of matches meeting in a school-based setting has dropped slightly, to approximately 45% (~90,000 youth) in 2010.

Several elements have differentiated SBM from CBM, including:

- SBM provides opportunities to engage volunteer-rich partners, like students (college and high school) and corporations, who participate in group enrollment, training, and may even spend program time together.
- SBM engages schools as partners, providing opportunities for BBBS staff and school personnel (teachers, counselors) to interact for the benefit of BBBS matches.
- SBM was believed to offer some cost-savings over CBM in the form of abbreviated volunteer and youth assessments during enrollment, fewer match support contacts (particularly with parents), and some increased efficiencies (e.g., training) created by working with groups of Bigs or Littles.
- Referral of students to SBM by teachers and counselors rather than by parents offers the potential to reach a population of children with greater risks and needs, including those whose families remained unfamiliar with BBBS services.

While some of these differences have indeed offered benefits for agencies and matches (particularly partnership opportunities with volunteer groups and schools), the distinction between SBM and CBM may have, in some ways, been drawn too sharply. Recognizing this, many agencies now operate "hybrid" programs (sometimes called "school-based plus"), combining some of the best elements of SBM (e.g., volunteer recruitment through partnerships, relationships with schools, group trainings) with proven practices from the CBM model (e.g., a 12 month commitment with expectations of a multi-year relationship, parent engagement, emphasis on child safety, encouraging one-to-one time in matches).

## The School-Based Mentoring Impact Study

In light of SBM's rapid growth in the early 2000s, BBBSA launched a study with Public/Private Ventures (P/PV) to determine the impact of SBM. In 2003, the SBM study was initiated with over 1,000 children in ten BBBS agencies across the country. It was the first nationwide, randomized study of SBM ever undertaken. Overall, the SBM impact study found positive outcomes for youth in the first school year of mentoring, however, it gave the network pause to consider how to lengthen and strengthen SBM matches, so that those impacts could be sustained over time.

Phase I of the study was conducted in 2004. A non-randomized study of program practices identified three factors that relate to better youth outcomes<sup>1</sup>:

- Socio-emotional match activities (as opposed to focusing on homework/tutoring).
- Matches that met more often and for longer periods.
- A strong school environment and involvement by teachers and principals.

The full study, Making a Difference in Schools, was issued by P/PV in 2007 and included these findings<sup>2</sup>:

- SBM has positive outcomes during the first year of matches. Eight positive academic outcomes were found including higher grades, higher feelings of academic competence, greater number of assignments completed, fewer serious school infractions, and less skipping of school.
- Perhaps in part because so many matches did not continue into the second year, these outcomes were, for the most part, not sustained in the second year.
- Longer matches and closer relationships were associated with stronger impacts. (Longer + Stronger = Impact)
- Summer meetings were an important way to lengthen and strengthen relationships.
- Volunteer training, supervision, and school support were critical in fostering stronger and longer relationships.
- The cost of SBM is only slightly lower than CBM.

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1 Available at <http://agencyconnection.bbbs.org>

2 Available at [http://www.ppv.org/ppv/publications/assets/220\\_publication.pdf](http://www.ppv.org/ppv/publications/assets/220_publication.pdf)

In addition, a 2008 companion study on the impact of SBM with high school Bigs found fewer positive outcomes resulting from these types of matches.<sup>3</sup> The report, however, affirmed the potential for impact in programs involving dedicated, well-trained high school Bigs who are committed to more than one school year and who clearly focus on the needs of their Littles. The High School Bigs Companion Study raises important questions for BBBS's SBM programs and necessitates further study on how such programs can be enhanced to cultivate longer, stronger matches with positive outcomes for youth.

The challenge that this set of findings posed to BBBS was clear:

**how can we cultivate longer, stronger matches in a school-based setting so that we have improved, enduring outcomes for our youth?**

During the final year of the study, the School-Based Mentoring Task Force – a group of agency representatives reporting to the Nationwide Leadership Council Mentoring Programs Committee – convened to consider the implications of the preliminary findings of the study. The Task Force recommendations were issued a few months before the study was published, and aligned with the general direction of the study. Recommendations included:

- Lengthen matches by asking for a minimum commitment of one calendar year at the beginning of the match. During the match, encourage multiple-year relationships. Take SBM out of the school year.
- Bridge the summer gap and increase match contacts by treating SBM as a year-round program with match support throughout the year.
- Provide volunteer training and enhanced match support to improve youth outcomes and track progress via quality metrics.
- Deepen school partnerships, forging stronger, deeper levels of involvement with schools and educational organizations.
- Deepen corporate and business partnerships.

Throughout the network, many agencies responded to these recommendations by undertaking efforts to lengthen and strengthen matches in school- and site-based programs. Whereas the average match length in 2008 was 10.6 months for school-based matches, it has been steadily increasing in the years since the study was released. In 2010, the average match length for school-based matches was 12.8 months. While this is a notable improvement, it is still significantly lower than the average for community-based matches (which was 23 months in 2010).

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<sup>3</sup> Available at <http://agencyconnection.bbbs.org>

## Development and Piloting of the Enhanced School-Based Mentoring Model (ESBM)

The ESBM model, development of which was funded by Altria and the William T. Grant Foundation, was created in early 2008 through a collaborative effort involving BBBS staff from 6 agencies (selected for having above average school-based match lengths), 2 prominent mentoring researchers, and key Big Brothers Big Sisters of America staff (see Appendix B). Beginning in 2008, 23 agencies participated in piloting the ESBM model to test its effectiveness in cultivating longer, stronger matches. Research Advisory Council members, Drs. Carla Herrera and Tom Keller, provided research expertise to support the pilot (see Appendix C).

With much at stake, the fundamental question driving the design and execution of the ESBM pilot was: **Does implementing evidence-based practices result in more matches carrying over into a second school year?** Based on ESBM pilot results, the answer was a solid “yes.” Over the course of the pilot, matches in the ESBM programs had a carryover rate of 56%, compared to 40% in the 2007 P/PV impact study.

Additional questions driving the pilot then focused on using data to determine which program practices may have the greatest potential to cultivate longer, stronger matches. This report contains results and recommendations for translating the findings into more effective practices in School-Based Mentoring programs.

## **Pilot Implementation and Research Methodology**

Twenty-three agencies implemented the ESBM model. Of the twenty-three, fifteen were randomly selected from a group of twenty-four who were willing and able to implement the model. The nine agencies that were not selected as ESBM pilots served as a control group in order to compare SBM retention rates.

Pilot agencies began implementing the enhanced model during the 2008-2009 school year, and they continued and refined their efforts through the 2009-2010 school year. Extensive data were collected throughout the two years of the pilot and into the 2010-2011 school year (in order to assess the number of matches that had continued from the prior school year). Collection of data ended in late 2010, and final analyses were conducted in 2011.

For the school years in which the pilot was conducted (2008-2009 and 2009-2010), baseline data were collected from teachers, youth (9 years of age and older), and mentors from new matches. Additionally, mentors were surveyed again in the middle of the school year in order to collect data about match support and training. At the end of each school year, follow-up data were collected from youth, teachers, mentors, and parents for both new matches and for those that had begun their participation prior to the 2008-2009 school year. In addition, agency staff completed a program survey at the end of each school year. Matches completed Strength of Relationship (SoR) surveys at three months and at the end of each school year, and in the second year of the pilot, youth completed Youth Outcomes Surveys (YOS) at baseline and at the end of each school year.

In addition to survey data, information was collected through BBBSA's AIM system. AIM data includes youth and mentor demographics (e.g., age, gender, ethnicity), match lengths, number of parents in the child's household, eligibility for free/reduced price lunch, reasons for match closures, and whether the matched youth had an incarcerated parent.

It is important to note that some elements of the ESBM model could not be individually tested or validated through the pilot process for direct association with longer, stronger matches. Many practices that are not highlighted in this report were reported in agency interviews and conference calls as improving their school-based program – both for participants' experience of the program as well as agencies' own experience implementing their programs. But for a variety of reasons (e.g., not enough variation among programs, not enough data collected) not all model elements could be comprehensively tested during the pilot. As described in the Next Steps section below, the final enhancements to be made to the school-based SDM will include recommendations identified through both quantitative data and qualitative evidence and experience of the pilot agencies.

## Summary of Findings

Of the ESBM model elements tested<sup>4</sup>, the following were determined to be most important in cultivating longer, stronger matches:

### **1. Twelve month commitment**

Programs that set an expectation that the match would last a minimum of twelve months were significantly more likely to have matches continue into a second school year. Bigs and Littles in these programs also reported stronger relationships (as measured by higher SoR scores on one or more scales) than Bigs and Littles in programs without this expectation. Similarly, programs that did not recruit high school seniors were significantly more likely to have their high school Bigs matches continue into a second school year.

### **2. Quality and quantity of match support for Bigs and Littles**

Programs in which Bigs reported receiving regular support through monthly contact with match support specialists outside of program time were significantly more likely to have matches continue into a second school year than programs in which Bigs did not report receiving this type of support. Bigs in these programs also reported stronger relationships.

### **3. Communication during summer months**

Programs that encouraged matches to communicate over the summer were significantly more likely to have matches continue into a second school year than programs that did not encourage summer communication. (Please note that because this, and several other program elements, have significant child safety implications, agencies should not implement them without taking appropriate child safety precautions – see Implications section, below)

### **4. Matches interacting one-to-one**

Bigs that reported interacting with other mentors, matches, or friends infrequently or not at all during program time were significantly more likely to have matches carry over into a second year than Bigs who reported frequent interaction.

### **5. Expanded interview and matching on interests**

Programs that used an expanded interview to learn additional information about the Big and Little (beyond what is required in the standard SDM process) during enrollment were more likely to have matches continue into a second school year than programs that did not use an expanded interview. Additionally, Bigs who reported (at follow up) having similar interests with their Little, were more likely to have matches that continued to a second school year, and both the Big and Little reported stronger relationships.

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<sup>4</sup> See Appendix B for full ESBM model implemented by pilot agencies.

In addition, several other elements were found to be associated with longer, stronger matches:

**1. Pre-match training for Bigs**

Programs in which Bigs reported at baseline to have received at least one hour of pre-match training, were more likely to have matches continue into a second school year than programs in which Bigs did not receive at least one hour of training.

**2. Parent support and engagement**

Programs that reported increasing their parent engagement efforts were more likely to have matches continue into a second school year than programs that did not.

**3. Involving Little in activity selection**

Bigs that reported including their Little in activity selection were more likely to have matches that continued into a second school year and reported stronger relationships compared to matches in which the Big alone, the school, or BBBS staff selected activities to be done during weekly meeting times.

**4. Deep school partnership**

Programs that had a signed memorandum of understanding (MOU) with schools had a higher percentage of matches continue into a second school year than programs that did not have an MOU. Also, programs in which evaluation reports were shared with school and district partners had a higher percentage of matches continue into a second school year.

## **Implications for Practice**

Both the qualitative and quantitative pilot findings have implications for many elements of the SBM delivery model. In this report, we lay out some important, direct implications from the ESBM pilot findings. These implications are not, on their own, a revised SBM service delivery model. Strategies and tools for implementing program changes are not detailed in this report, but will be provided in a revised SBM service delivery model – please see Next Steps section, below.

The implications for service delivery are described in order of function (roughly chronological order from the perspective of a match), not in order of importance.

### **Implications for partnerships**

Developing a strong relationship with school partners, as signified by an MOU, with clarified roles and responsibilities as well as sharing of mutually beneficial resources, stood out as an important element of a successful school-based program. Solidifying the relationship between BBBS and schools can help to pave the way for positive interactions between BBBS staff and teachers, counselors, and other school staff, as well as aid in averting later conflict over roles or misaligned expectations. Similarly, the sharing of program results with school or district partners is an important way to stay aligned – and co-invested – in the success of a school-based program.

While the ESBM pilot did not specifically test the benefits of engaging corporate or other partners as sources of volunteers, this remained an important component of school- and site-based program recruitment during the ESBM pilot and can be an efficient way to deliver pre-match training (which contributes to longer, stronger matches). Of greatest importance when engaging volunteer-rich partners is setting the expectation that being a Big is a minimum 12-month commitment with the expectation of a multi-year relationship.

As previously noted, the potential benefits of engaging high school Bigs, and how to help high school students become effective mentors, requires additional focused study (findings relating to high school mentors in the context of the ESBM pilot are detailed in Appendix A).

## **Implications for recruiting**

In any recruiting effort, whether through corporate partners or individual volunteers, setting the expectation that school-based mentoring requires at least a 12-month commitment is crucial to cultivating long, strong matches. This 12-month commitment should include an expectation that matches will communicate over the summer (and during other extended school breaks) via email, text, or phone, and/or that matches will participate in *agency-sponsored, supervised* activities during the summer.

In addition, especially when recruiting high school or college students to serve as Bigs, the expectation should be set that matches will spend the majority of their time in one-to-one interactions, not socializing in groups. It is essential to maintain the one-to-one model of mentoring in the school context, and agencies should clarify this expectation when recruiting groups of volunteers (who are likely to know each other and may be inclined to spend match time together).

## **Implications for enrollment and matching**

As in recruitment, the most important practice implication for the enrollment and matching process is setting and reinforcing the 12-month commitment and expectation of a multi-year relationship with all parties (including parents and youth). Reinforcing this commitment will require foresight and planning during the enrollment period and at the outset of a match – for instance, if the Big or Little will be graduating or moving on to a new school the following year, it may help to discuss where the match will meet during the next school year. In such cases, the option to transition to a community-based match at, or prior to, the end of the first school year may need to be discussed with participants in order to help solidify their commitment to 12 or more months of mentoring.

The ESBM pilot findings do not suggest, unequivocally, that high school or college seniors should never be Bigs, but seniors do have significantly lower carry-over rates than other Bigs. For that reason it is especially important to ask seniors for a full calendar year commitment and to discuss options for where and how continued mentoring might take place, depending on anticipated changes in the mentor's life (e.g., in a community-based setting, so that the match can meet on weekends if the Big is starting a job).

In addition, careful matching based on information gathered from Bigs, Littles, and parents can contribute to longer, stronger matches. Matches in the ESBM pilot were longer and stronger when participants shared common interests. Matching based on interests is a common practice in community-based programs and should be equally important in school- or site-based programs.

Both the recommendation that matches spend one-to-one time together and that they communicate over the summer have important implications for child safety and, thereby, impact enrollment and matching practices. While one-to-one time does *not* mean that matches must or should be meeting in a private location, it is strongly recommended that agencies take greater safety precautions when encouraging matches to meet one-to-one. Similarly, encouraging communication over the summer and school breaks does *not* mean that matches can be permitted to meet in person without BBBS staff supervision, but it still requires additional safeguards.

At the enrollment stage, diligent screening and assessment of Bigs is required. Child safety best practices, such as layered criminal history checks, phone references from youth-serving organizations, written or phone references from family members (especially the applicant's spouse or partner) and friends, and child safety training, are essential in a school- or site-based program. In addition to providing safeguards for our youth, pilot findings demonstrate that programs utilizing enhanced assessments of Bigs (via additional questions at interview) also had higher carry over rates.

Greater parent engagement at the enrollment and matching stage provides additional safeguards for the youth and helps to cultivate longer, stronger matches. Asking parent/guardian preferences for the match, informing them that their child has been matched, and setting the expectation with parents of a minimum 12-month involvement in the program, were all found to be important elements of the ESBM model.

## **Implications for match support**

The findings from the ESBM pilot suggest that both quality and quantity of match support contacts are important for cultivating longer, stronger school-based matches.

For Bigs, program staff should be in regular, monthly contact with Bigs. To ensure that these are high-quality contacts, they should occur outside of program time (i.e., not by removing participants from a match meeting) and provide sufficient opportunity for interactive, two-way discussions. Match support contacts should not be made in groups (e.g., multiple Bigs in group discussions) in order to ensure that each Big feels supported and is provided with an opportunity to ask questions, give feedback, and receive coaching.

Similarly, quality and quantity of match support contacts is important for youth and parents/guardians – both to ensure that they feel supported and connected to BBBS and to ensure the child’s safety. As previously described, encouraging one-to-one time during school meetings and summer communication requires enhanced safety precautions. Regular, individual contacts with the youth and parent/guardian are essential to surfacing concerns and preventing (or detecting) child safety issues. It is recommended that parents are contacted, at a minimum, every semester. For Littles, as with Bigs, regular contact (on a monthly basis) outside of program time is the recommended practice based on findings from the ESBM pilot.

In addition, BBBS staff providing program supervision or oversight (whether provided by match support staff or other agency staff) should enable and encourage matches to spend one-to-one time together. Insofar as it is practical within the physical space available, matches should be permitted and encouraged to engage in individual conversations and activities during program time. And, where possible, encouraging matches to choose activities together can help cultivate longer, stronger match relationships.

Finally, throughout the academic year, match support staff should be reinforcing the expectation that the match will continue during the summer and into the following school year. Agencies should strongly encourage contact during summer and school breaks in the form of email, text, and phone contacts. Ideally, agency-hosted group match activities would be made available as opportunities for matches to see each other in a safe, supervised setting during the summer months. As shown in the ESBM pilot, providing multiple options and utilizing a variety of strategies to encourage Bigs to communicate with Littles over the summer can help matches continue through the summer and into the following school year.

## Summary Table of Implications by Functional Area

	Partnership	Recruitment & Customer Relations	Enrollment & Matching	Match Support
<b>Implications</b>	<ul style="list-style-type: none"> <li>• Build strong partnerships with schools, including clarified roles &amp; signed MOU</li> <li>• Partner with volunteer-rich organizations, setting expectation of minimum 12 month involvement</li> </ul>	<ul style="list-style-type: none"> <li>• Recruit for minimum 12 month commitment with summer contract</li> <li>• When recruiting groups or responding to inquiries, set expectation for one-to-one match interactions</li> </ul>	<ul style="list-style-type: none"> <li>• Reinforce and plan for minimum 12 month involvement</li> <li>• Carefully screen, assess, and train Bigs to promote child safety</li> <li>• Engage parents in the process</li> <li>• Match based on expanded participant input and common interests</li> </ul>	<ul style="list-style-type: none"> <li>• Provide frequent regular contacts with all participants</li> <li>• Make contacts outside of program time and provide opportunity to listen to, support, and coach</li> <li>• Encourage one-to-one interaction</li> <li>• Encourage summer and holiday contact</li> </ul>
<b>Responsible Staff</b>	<i>"Agency engagement," program leadership, marketing</i>	<i>Marketing, customer relations, volunteer recruitment</i>	<i>Enrollment and matching</i>	<i>Match support, supervisors of school match activities</i>

The experience of agencies and findings of the ESBM pilot provide confidence that school-based matches can be longer and stronger than they have been in the past, and that through such relationships, BBBS can bring about sustained positive outcomes for youth. The SBM Impact Study of 2007 and the ESBM pilot also encourage us to approach SBM with the same thoughtfulness and attentiveness to relationship development, child safety, and engagement of all participants (Bigs, Littles, parents, and teachers/school personnel) as we do in community-based programs. In fact, an enhanced school- or site-based model looks more like BBBS's community-based model than perhaps was anticipated when the original SBM model was introduced in 2000, and indeed, pilot findings suggest that some of the SBM elements believed to have provided cost savings over CBM (such as an abbreviated assessment process and less frequent match support contacts) may impede agencies' ability to cultivate long, strong school-based matches.

In this next phase of program enhancement, BBBSA will revise the service delivery model to incorporate findings from both this study (quantitative and qualitative) and developments identified through external research in the field of youth mentoring. As part of this work, strategies, revised training, and tools will be provided (e.g., revised forms) in support of the enhanced model. AIM will also be modified to support the enhancements (in conjunction with the modifications required to support the new Standards of Practice that were approved at the June 2011 Annual Meeting of the Members).

### ESBM Practices and Carryover to Second School Year

**Program element: requesting a minimum one calendar year commitment and clearly communicating expectations for multiyear relationships; not recruiting seniors**

We asked program staff if they asked mentors for a 12-month commitment and we also asked mentors and parents how long the mentoring relationship was expected to last. For all three reporters we found that in programs/matches, where at least a 12-month commitment was expected, matches were significantly more likely carry over to a second school year.

Also significant was that high school seniors had a lower percentage of carried over matches compared to younger high school Bigs.

**Program element: using an expanded interview to learn more about students and matching based on similar interests**

We asked program staff whether they developed additional assessment questions for mentors and youth beyond the standard SDM template. Program staff who reported developing additional questions for mentors and youth had more matches carry over than those who did not develop additional questions. Also, mentors who reported having “some” or “a lot” of similar interests with their Littles had a higher rate of carry over into the next school year compared to those reporting “no” or “very few” similar interests.

**Program element: providing one hour of pre-match volunteer training**

Mentors who reported receiving at least one hour of pre-match training were more likely to carry over their match than those mentors reporting less than one hour of training.

**Program element: having the majority of match interactions be one-to-one and including Little in decision making**

Bigs who reported only occasionally including others in match meetings were more likely to be in matches that carried over compared to Bigs who reported including others in match meetings at least twice a month. Also, Bigs who either let their Littles choose the activity or included them in activity selection were more likely to be in matches that carried over than were Bigs in matches where the school, BBBS staff, or Bigs themselves selected the activities.

**Program element: providing monthly match support for Bigs outside program time during the first 12 months of the match**

Bigs who agreed or strongly agreed that they received regular guidance from BBBS staff and who received at least monthly support from staff *outside of program time* had more matches carry over compared to those who did not agree or were neutral in their response.

**Program element: encouraging Bigs to communicate with Littles during school breaks and at least twice during the summer**

Programs that reported encouraging communication during breaks and summer had a higher percentage of matches carry over compared to those that did not. Also, agencies that used at least four different strategies to encourage Bigs to communicate with Littles over the summer had more matches continue to meet the following school year compared to those that used three or fewer strategies. Additionally, matches that discussed or planned to see each other or talk over the summer were more likely to carry over than matches that did not discuss summer plans.

**Program element: honoring the role of the parent by involving them in activities and discussions and using information provided by the parent to help determine best match for child**

There was higher carry over in programs where staff reported increasing their parent engagement efforts as compared to those that did not report increased engagement. Also, Littles whose parents reported having a chance to approve their child's mentor were more likely to be in a match that carried over as compared to youth with parents who did not report being given a chance to approve the mentor.

**Program element: having a signed MOU with partner schools, providing schools with outcomes/feedback, and providing an end-of-year evaluation report**

Programs that reported having a signed MOU with schools had a higher percentage of matches carry over than those that did not report having a signed MOU. Additionally, those that reported sharing evaluation findings with school partners also had a higher percentage of matches carry over compared to those that did not report sharing evaluation findings.

## **ESBM Practices and Strength of Relationship (SoR)**

### **Program element: requesting a minimum one calendar year commitment and clearly communicating expectations for multiyear relationships; not recruiting seniors**

When Bigs expected the mentoring relationship to last at least 12 months, both Littles and Bigs reported stronger relationships. Additionally, programs that reported consistently communicating the 12-month commitment had both Bigs and Littles reporting stronger relationship quality compared to Bigs and Littles in programs where a 12-month commitment was not consistently communicated.

Youth matched with high school seniors reported higher relationship quality than those youth matched with younger high school students. Also, high school seniors reported stronger relationships than younger high school Bigs. These findings are in contrast to the finding that matches with seniors were less likely to carry over into a second school year. Therefore, it appears as though seniors are able to create strong relationships in the program, but are less likely to continue the relationship.

### **Program element: matching based on similar interests**

Bigs who reported feeling they had “some” or “a lot” of similar interests with their Little when they were first matched reported higher relationship quality for both the 3-month and end of year SoR in all categories than Bigs who reported they had “no” or “very few” similar interests when they were first matched. Additionally, Littles matched to those Bigs also reported higher relationship quality for all 3-month SoR categories.

### **Program element: providing one hour of pre-match volunteer training**

Littles matched with Bigs who reported receiving pre-match training reported stronger relationship quality at the end of the school year than did Littles matched with Bigs who did not report receiving pre-match training.

### **Program element: having the majority of interactions be one-to-one and including Little in decision making**

Bigs in matches where the time spent was mostly one-to-one reported higher relationship quality. In addition, Bigs who reported that most of the time they selected activities with their Little or that their Little selected activities had higher overall relationship quality (as reported by the Bigs) than Bigs who reported the school, program or they (Bigs) selected the activities.

**Program element: providing monthly match support for Bigs outside program time during the first 12 months of the match; providing monthly match support for youth for the first three months; using the SoR to help with match support**

Bigs who reported that they received regular guidance from program staff and that staff contacted them at least monthly outside of program time had significantly stronger relationships than Bigs who did not report regular, monthly guidance/support.

Additionally, youth who reported talking to someone regularly about the program reported stronger relationship quality than youth who did not report talking to someone on a regular basis. Youth in programs that reported using the SoR in match support reported stronger relationship quality than youth in programs that did not use the SoR in match support.

**Program element: Encouraging Bigs to communicate with Littles during school breaks and at least twice during the summer**

Littles in matches where summer plans were discussed reported stronger relationship quality as compared to matches where summer plans were not discussed.

**Program element: honoring the role of the parent by involving them in activities and discussions; and using information provided by the parent to help with matching**

In matches where parents reported being happy with how they have been involved, Littles and Bigs reported stronger relationship quality compared to matches where parents did not report feeling they were happy with their level of involvement.

## **Outcomes**

We found significant baseline/follow-up changes for Littles in the ESBM program in the following areas:

### **Youth Reported:**

Social Acceptance  
Scholastic Efficacy  
Academic Performance  
Special Adult

### **Teacher Reported:**

Classwork Quality  
Academic Functioning  
Social Acceptance

These findings are consistent with previous evaluations of SBM programs.

## **2008 Pilot Version of the BBBS Enhanced School-Based Mentoring Model**

**Recommendations of  
The School-Based Mentoring Task Force (Spring, 2007)  
and The Enhanced School-Based Mentoring Model Work Group (Spring, 2008)**

### **Strategies to Strengthen School-based Mentoring**

1. Set goals and monitor metrics
2. Foster longer and stronger matches through:
  - 2a. Recruitment
  - 2b. Screening and matching
  - 2c. Training
  - 2d. Match meetings
  - 2e. Match support
  - 2f. Closure
3. Bridge the summer gap and increase communication between matches
4. Encourage parental involvement
5. Deepen partnerships with schools and districts
6. Deepen partnerships within the corporate/business community
7. Enhance development of staff

## **1. Set goals and monitor metrics.**

Successful programs feature strong performance management strategies. This section emphasizes the importance of internal efforts to achieve program objectives by organizing work efficiently and effectively.

### **Essential<sup>5</sup> elements**

- 🍏 Develop an integrated performance management process that includes goal-setting for both growth and quality measures.
- 🍏 Develop a 3-5 year plan with goals with goals and strategies to improve:
  - o SBM Average Match Length;
  - o Retention rate;
  - o Strength of relationships; and
  - o Outcomes.
- 🍏 Measure and monitor performance metrics on regular schedule
- 🍏 Reconsider and revise practices as necessary based on performance indicators

### **Recommendations<sup>6</sup>**

- 🍏 Adopt a SBM growth framework based on an increase in match length and moderate growth in new matches.
- 🍏 Determine appropriate balance between relative number served in CBM and SBM programs to achieve overall agency goals for growth, match longevity, and outcomes.
- 🍏 Within the SBM program, determine the appropriate balance among corporate, college, and high school volunteers to achieve goals for growth, match longevity, and outcomes.
- 🍏 Have CEO and top leadership team engage in discussion around Retention Rate/Quality Service framework. Answer self-assessment questions and build plan of action to more broadly address and support needs for building and sustaining a mission-driven culture of quality and performance.”
- 🍏 Analyze premature closures and develop remedial plans to address similar situations in the future.
- 🍏 Recognize staff for meeting goals.

## **2. Foster longer and stronger matches. Take SBM Out of the School-Year Cycle.**

Professional program practices provide the foundation for successful mentoring relationships. This section presents the basic program policies and guidelines establishing a common set of expectations among all program participants as well as program staff.

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<sup>5</sup> Essential elements are those that are required as part of the implementation project.

<sup>6</sup> Recommendations are not required, but strongly recommended.

## **2a. Recruitment**

### ***Essential elements***

- 🍏 Ask for a minimum of a one calendar year commitment (not just a school year).
- 🍏 Recruit participants with a possibility of completing two school years of mentoring in schools served by your program (avoid high school or college seniors and children expected to transition to a non-program school.)
- 🍏 Provide orientation that clearly communicates to all participants the expectation for multiple-year relationships.

### ***Recommendations***

- 🍏 Work with schools to identify students in the spring prior to their participation.
- 🍏 Work with partners to recruit volunteers in the spring or summer prior to their participation.
- 🍏 Increase the number of “feeder-receiving” schools so matches can continue despite a move or transfer from elementary to middle school.
- 🍏 When possible, recruit a pool of children larger than the number of potential Bigs to facilitate quality matchmaking.

## **2b. Screening and matching**

### ***Essential Elements***

- 🍏 Use expanded SDM interview to learn more about student (template will be provided).
- 🍏 Obtain parental permission for High School volunteers under 18 years old.
- 🍏 Use a formalized system for matching that incorporates information obtained from Bigs, Littles, teachers, and parents and that takes similar interests of Bigs and Littles into consideration.
- 🍏 Start matches as early as possible in the school year.

### ***Recommendations***

- 🍏 At the beginning of the match, or during the school year, screen matches to allow the option of off-campus involvement.
- 🍏 Use the same volunteer application and interview (omitting the Home Assessment section) for both Community-Based and School-Based programs to make possible transfer to CB easier.
- 🍏 Utilize the Pre-Interview Questionnaire to gain logistical/scheduling information.
- 🍏 Use reference forms for HS Bigs that capture information on the applicant’s past behavioral student record (we will provide template).
- 🍏 Conduct the interview in a location convenient to the Big.

## 2c. Training

### ***Essential elements***

- 🍏 Ensure each Big receives at least one hour of pre-match training, and **HS Bigs receive two hours**, which should include use of the BBBS Volunteer Training Guide or a Guide that covers program policies and procedures and other relevant topics (e.g., role of Big, school environment/culture, relationship development, expectations for summer content). The training can be carried out in groups, one-on-one, or online.
- 🍏 Provide volunteers with a pre-match orientation guide to help retain information and serve as a reference.
- 🍏 Provide focused training for high school Bigs to meet their special needs.
- 🍏 Provide training opportunities throughout the school year so that each Big is involved in at least two training sessions (group, online, or individual format).

### ***Recommendations***

- 🍏 Provide pre-match training to Littles (e.g., roles, expectations, procedures, support) (we will provide template).
- 🍏 Provide a brief orientation to teachers and school personnel (e.g., discuss roles of Bigs/Littles, review logistical arrangements, etc.)

## 2d. Match meetings

### ***Essential Elements***

- 🍏 Matches should meet a minimum of 45 minutes per meeting if meeting weekly and a minimum of 2 hours per meeting if meeting bi-weekly.
- 🍏 Matches should meet at least bi-weekly.
- 🍏 The majority of each match meeting should be one-on-one interaction between Big and Little.
- 🍏 Match meetings should be oriented toward socio-emotional activities.
- 🍏 Bigs should include Littles in selecting activities.

### ***Recommendations***

- 🍏 Focus first meetings on building the relationship and setting expectations.
- 🍏 Encourage a minimum of 1 hour per visit.
- 🍏 Encourage at least 4 hours of contact per month.
- 🍏 Provide an after-school option for match meetings.
- 🍏 Establish flexible match-meeting time frames to accommodate changes in volunteer schedules.
- 🍏 Encourage contact between match meetings via email, phone calls, etc. to build match relationships.
- 🍏 Facilitate the opportunity for Bigs to talk with Littles' teachers on a quarterly basis.

- 🍏 Offer incentives for matches to continue in the program in the second and third years, e.g., graduating up to new levels (e.g. from strivers to achievers to superstars), special recognition, special privileges, etc.

## **2e. Match support**

### ***Essential elements***

- 🍏 For college and adult volunteers provide monthly, individual match support contacts for Bigs during the first 12 months of the match. (Email should not be the only method of communicating with matches for match support, and for the first six months of the match an in-person contact should not “count for” 2 months—after the first 6 months, in person can count for 2 months, but if the contact is not in person then support needs to be monthly.) For the summer, the following rules apply for Bigs:

***If a SB match commits to staying in contact via email, phone, or mail over the summer – and/or they anticipate participating in agency-sponsored summer activities – then this match:***

- remains “active” in AIM, and
- MS support continues with SB match support schedule

***If a SB match commits to seeing each other in-person over the summer to enjoy activities in the community, then this match:***

- remains “active” in AIM,
- needs to be transferred into the CB program (in AIM) so as to have the volunteer re-accepted upon the completion of additional background checks and assessment,
- needs to have the parent/guardian informed and provide approval (additional assessment), and
- MS support continues with CB match support schedule (because of the transfer, 1st year CB match support scheduling will apply, regardless of how old the SB match is).
- When school starts again in the fall, if the match will primarily meet as a SB match, we recommend transferring the match back to SB in AIM. If the match will continue to have regular in-person contact outside of school (more than once a month), we recommend keeping the match in CB so that the appropriate level of match support is followed.

***If a SB match commits to resuming their match in the fall but cannot stay in contact over the summer months at all, then this match:***

- is classified as “inactive” in AIM for the summer months, and

- BBBSA strongly recommends agency staff to continue communication with both match parties over the summer to keep them engaged with the agency (in AIM, log contact with either party under the "Communication Log" tab)

***If a SB match will not be able to communicate over the summer and does not anticipate resuming in the fall, then this match:***

- gets closed (made "completed") in AIM, and
  - the child is assessed for re-matching if possible
- 🍏 For matches with High School Bigs, maintain monthly contact for the first two years of the match relationship and then bi-monthly afterward (e-mail should not be the only method of communicating with matches for match support, and an in-person contact does not "count for" 2 months).
  - 🍏 Provide monthly contact for the youth in the first three months of the match and bimonthly afterward (if in person).
  - 🍏 Matches designated "yellow" in the second school year should receive monthly contact.
  - 🍏 Match Support contacts should take place outside of program time/match meetings.
  - 🍏 Use the Strength of Relationship Measure to strengthen match support.
  - 🍏 At least 86% of Match Support contacts should be completed on a monthly basis.

***Recommendations***

- 🍏 Employ a "mixed" approach of in-person, phone, and email match support contacts.
- 🍏 Use the Quality Assurance System to assess and strengthen match support quality.
- 🍏 Establish guidelines for evaluating and addressing possible inconsistency/instability of match meetings on a quarterly basis.
- 🍏 Assess continuing matches in first weeks after summer to make sure they have reunited for regular meetings (or re-match Little soon after).
- 🍏 Help Bigs find the balance between fostering youth-centered choice and promoting youth development goals.
- 🍏 Find ways to regularly recognize and reward volunteers and tell them they are making a difference.
- 🍏 Assess the child's needs in a case plan and connect the child with other services and supports within and outside the school (e.g., counseling, tutoring, extra-curricular activities, etc.).

- 🍏 Provide additional training and match support that focuses on the special needs of High School Bigs.
- 🍏 Form a support group or on campus club for High School and University Bigs to provide additional training and support and give them opportunities to interact with their peers.
- 🍏 Bottom line: Increase quality of match support to anticipate and resolve potential problems and provide ongoing coaching.

## **2f. Closure**

### ***Essential Elements***

- 🍏 Do not close the matches at the end of the school year if the expectation is that they will continue in the fall.
- 🍏 Encourage a “farewell” meeting between Big and Little whenever possible.
- 🍏 Conduct an in-person closure meeting with Big and Little present whenever possible.
- 🍏 Meet with the child in person to reassure that the closure is not his/her fault and to allow time for the child to ask questions and express feelings.
- 🍏 Interview/reassess child for rematching at same time, expediting the rematch process.
- 🍏 Inform the school contact/teacher about the closure.
- 🍏 Call/contact the parent to notify of the closure.

### ***Recommendations***

- 🍏 Encourage BBBS staff to visit children whose matches have closed when they are at the school.
- 🍏 When a Little leaves a school:
  - o Communicate with the new school.
  - o Try to continue the relationship with the Big. If not possible, ask the Big to meet once or twice at the new school with the Little.
  - o Try to transition the match to the CBM program if Big is 18 or older.

## **3. Bridge the summer gap and school breaks**

The summer break is the greatest structural obstacle in school-based mentoring. Programs need to be creative in finding ways to support ongoing contact between Bigs and Littles that maintains the mentoring relationships.

### ***Essential elements***

- 🍏 Mentors should be encouraged to communicate with their Littles at least two times a month over the summer.
- 🍏 Mentors should be encouraged to communicate with their Littles during holidays and other out-of-school time.

- 🍏 During the summer, match activities can include agency events, phone calls, postcards, email, or letters. Face-to-face contact is not allowed without agency or school supervision, unless the match is screened for CBM.
- 🍏 When reasonable (i.e., the Big is not a HS student and parental permission is feasible), encourage matches to be screened for CBM to increase summer and holiday activities.
- 🍏 See match support elements above for summer match support guidelines

### ***Recommendations***

- 🍏 Organize an activity at the end of the school year for matches to discuss their summer plans and plans for contacting each other. Include an agreement for contacts which the Big and Little sign.
- 🍏 Have summer support strategies in place to encourage communication in matches that have not had consistent summer communication.
- 🍏 Structure Summer Contacts ensuring that parents are kept informed:
  - o Telephone Contacts—Provide phone numbers for the volunteer and child, set appropriate times for calling, give guidance for the content of conversations, and determine if the parent/guardian needs to know when phone calls are being made by the volunteer or child.
  - o Emails or Letters—Emails or letters should be about subjects similar to the conversations that the Big would have with the Little at the SB program. Do not allow Bigs to forward emails (unless from BBBSA) to Littles or put the Little in their mass e-mail contact list.
  - o In-person summer contacts—These need to be at a supervised setting like a school or agency event unless the volunteer is screened community-based. Also, Bigs cannot provide transportation for their Littles unless they are screened for CB.
- 🍏 Explore alternate summer meeting locations such as Boys & Girls Clubs.
- 🍏 Send out a summer newsletter or letter/email to matches to remind them to keep in touch. Highlight any BBBS summer events or new ideas for matches to use when communicating with each other.
- 🍏 Invite parents to all summer activities to help the agency and mentor get to know the parent and help with transportation. Try to create family events, so that the parent can bring the child's siblings too.
- 🍏 Host a school supply drive over the summer to collect school supplies for participating youth, and encourage parents to pick up their child's supplies before school starts.
- 🍏 Obtain funds for creating, purchasing, or using in-kind donations to develop materials to help matches bridge the gap during the summer, holidays, and other out-of-school time. Examples of resources can be obtained through BBBSA.

#### **4. Encourage parental involvement**

Although school-based mentoring can provide valuable support to students and their families, parents/guardians remain responsible for decisions affecting the well-being of their students. Programs must honor and value the central role of the parent/guardian and seek to establish a collaborative partnership with the family. This section notes that it should be the responsibility of programs to consistently provide information to parents/guardians. To avoid penalizing any students, participation in the program should not be dependent upon parent/guardian involvement beyond the absolute essentials (i.e. completing consent forms).

##### ***Essential elements***

- 🍏 Honor the role of parents/guardians by involving them in activities and discussions.
- 🍏 Use the parent permission form to learn about the parent's match preferences (e.g., gender, race) and to describe rules that prohibit Bigs from seeing Littles outside of the supervised location, but allow phone and e-mail contact if parent authorizes.
- 🍏 During the first week of the match, inform the parent/guardian (preferably by phone) that the match has been made and describe the parent's role in supporting the match. Share the Parent Orientation Guide (template to be provided by BBBSA) with them and review key points.
- 🍏 Contact the parent/guardian at least once during the school year and once during the summer by phone if possible, or by mail.
- 🍏 Emphasize that this is a year -round program model in conversations with parents.

##### ***Recommendations***

- 🍏 Conduct a pre-match phone call with the parent prior to the match introduction.
- 🍏 Attend school open houses and parent/teacher conferences as opportunities to meet with parents.
- 🍏 Host a Parent Night at the program and have Littles invite parents to meet their Bigs.
- 🍏 Invite parents to all Agency events.
- 🍏 Encourage the match to write a letter to the parent about their match.
- 🍏 Recognize and appreciate parents.
- 🍏 Enlist parents as volunteers.
- 🍏 Contact the parent/guardian during the enrollment process to provide orientation and encourage communication throughout the duration of the program.

- o Explain the basics of the program
- o Ask questions to learn about the Little, the Little's family, and his/her needs.
- o Answer any questions the parent/guardian might have.
- o Confirm that the parent/guardian received the Orientation Guide.
- o Ask about transportation for the Little to summer events.

## **5. Expand and deepen partnerships with schools and districts**

As the hosting organizations for mentoring programs, schools and districts provide access to students and support to mentors. A collaborative and mutually beneficial relationship with school partners makes it possible to reach more students and serve them better.

### ***Essential elements***

- 🍏 Meet with school partners each year to sign a new Memorandum of Understanding or agree to a written set of mutual expectations.
- 🍏 Negotiate arrangements to follow students and preserve matches when students transfer between schools.
- 🍏 Make arrangements regarding referrals (i.e., spring referrals) and access to facilities for summer.
- 🍏 Share outcomes/feedback specific to the school and community at key points during the year.
- 🍏 Present an evaluation report to school and district partners at the end of each school year.
- 🍏 Inform school contacts/teachers about match closures.

### ***Recommendations***

- 🍏 Develop an annual growth plan for partnership development.
- 🍏 Develop SBM programs in schools and districts where possible to concentrate the number of matches so staff and volunteers are visibly present and can have a combined effect on classrooms, schools and community.
- 🍏 Partner with elementary and middle schools in close proximity so matches in elementary schools may continue in middle schools.
- 🍏 Communicate and continuously sell the program.
  - o Meet regularly with principals, school liaisons, guidance counselors and teachers.
  - o Keep school staff informed about impacts both for individual Littles and for the entire program.
  - o Reinforce the message that caring relationships ("the fourth R") lead to **academic** gains.

- 🍏 Gather feedback from schools on impacts on the children, classrooms, schools and the community.
- 🍏 Recognize the contributions of your school partners; thank teachers, guidance counselors and school secretaries and feature positive stories in your newsletters.
- 🍏 Administer partner satisfaction surveys and implement changes in the program to enhance satisfaction based on results.
- 🍏 Develop a written partnership growth/strategic plan.
- 🍏 Outline expectations with partners that the SBM program is a “year-round” program.
- 🍏 Train site liaisons to make sure they understand the importance of long, strong matches and how the school environment can contribute.
- 🍏 Lead the development of local partnerships with educational organizations.
- 🍏 Assign dedicated match support staff that work with specific school; if possible locate staff on-site.

## **6. EXPAND/Deepen partnerships with the community, especially corporate/business sector**

The community, particularly the corporate/business sector, provides the resources for building school-based programs. This section emphasizes developing sustainable strategies for generating consistent financial support and a steady supply of volunteers.

### ***Essential elements***

- 🍏 Meet with partners each year to evaluate program satisfaction and agree to mutual expectations. Agreement may take the form of Memorandum of Understanding or a written set of expectations.
- 🍏 Share outcomes/feedback specific to the partnership and community at key points during the year.
- 🍏 Present an evaluation report to partners at the end of each school year.
- 🍏 Request financial support.

### ***Recommendations***

- 🍏 Develop an annual growth plan for partnership development.
- 🍏 Develop high concentrations of Bigs from companies and organizations near schools; drive partnerships through sales skills.
- 🍏 At each corporate partner site, Identify or develop an organizational “internal champion” as a proactive liaison to build and expand the BBBS/organization relationship. Also, identify a BBBS staff who will serve as the main point of contact/liasion for each partner.
- 🍏 Conduct enrollment at the partner’s location.
- 🍏 Recognize and promote the organization’s contribution to the community

through their involvement as a partner in the BBBS Schools Program.

- 🍏 Hold employee recognition luncheon, reception, or other event.
- 🍏 Pursue opportunities to enrich the gender and ethnic diversity required to meet the needs of your community's children through strong partnership with targeted organizations (Men, African American, Hispanic, Immigrant Groups).
- 🍏 Administer partner satisfaction surveys and implement changes in the program to enhance satisfaction based on results.
- 🍏 Outline expectations with partners that the SBM program is a "year-round" program.
- 🍏 Capitalize on existing school-corporation partnerships.
- 🍏 Organize student field trips to offices of partners.

## **7. Enhance development of staff**

Regardless of position, all program staff involved in the school-based program contribute to the successful implementation of this model. Program staff should be recognized for their commitment and expertise. They should receive thorough training, appropriate workloads, and adequate compensation. Agencies should prioritize the consistency and longevity of program staff so that they can model the attributes we wish to see in mentors: being consistent, attentive, responsive, and wise.

### ***Essential elements***

- 🍏 Adopt the behavioral-interviewing process promoted by BBBSA's Learning and Development division (will provide more information in the beginning of 2009).
- 🍏 Ensure all staff are certified through the new Program Certification Process starting in 2009. In the meantime, ensure high levels of staff training and require all staff to complete the on-line SDM training within 60 days of hire.
- 🍏 Train existing staff and new staff on the Enhanced SBM model.
- 🍏 Establish clear lines of authority and identify specific staff responsible for each function required by SDM for School-Based Mentoring.

### ***Recommendations***

- 🍏 Review your SBM staffing model to assure that it is one best suited to the agency's staff size and geographical location. as well as assuring that all SDM functions are staffed.
- 🍏 Adopt a staff-to-match ratio that fosters high-quality matches.
- 🍏 Set goals for average tenure of program staff
- 🍏 Retain staff members over the summer to continue all facets of SB program operations, including recruitment, screening, and pre-matching of program participants in preparation for early fall matching, as well as planning for summer activities and providing match support for Bigs, Littles, and families.

## Appendix C: Memorandum from research advisors

**From: Thomas Keller, Ph.D., Carla Herrera, Ph.D.**

**Date: June 15, 2011**

**Re: ESBM pilot project summary**

Following a randomized trial of school-based mentoring (SBM) programs in several of its affiliated chapters, Big Brothers Big Sisters of America (BBBSA) instituted a systematic process of program development and implementation designed to strengthen mentor-mentee relationships in school settings. Prior to the release of findings from the impact study, BBBSA formed a School-Based Mentoring Task Force that endorsed several practices consistent with the recommendations in the study's report (Herrera et al., 2007). Subsequently, BBBSA undertook a multi-year effort to develop and pilot test an Enhanced School-based Mentoring Model (ESBM). The primary goal was to extend the average length of mentoring relationships by increasing match retention over the summer break and into the next school year. In 2007, a committee was composed of representatives from six leading BBBS chapters and BBBSA national office staff to craft the new approach. In addition, the two of us were engaged as external research consultants to assist in developing and evaluating the ESBM model. In this letter, we summarize our observations of the project in terms of both process and outcome.

The development of the ESBM model was an internally driven process. The leadership of the BBBSA National Network led the initiative. The National Office staff, most notably the Director of Research and Evaluation, played a primary role in coordinating and overseeing the project. However, the effort was structured to include substantial involvement on the part of experienced professionals from BBBS chapters. Participation from chapter representatives was an important ingredient in ensuring the relevance, feasibility, and credibility of the model that emerged. Throughout the design process, emphasis was placed on developing a model based on the best information available, drawing on the findings of the SBM impact study, published research on mentoring, and the practice-based evidence of the program experts. Contributors were asked to design the best program possible, even if it meant making significant changes to what was currently being implemented. The design committee met on multiple occasions, first to understand the parameters and goals of the project and later to discuss whether and how particular program components would be incorporated in the overall ESBM model. Much of the work, however, was completed within subcommittees that addressed more narrowly focused program issues and components. As researchers, our role was to provide access to relevant literature and to help in organizing the work of the subcommittees into a coherent format representing the new model. The final model was structured around several specific aims, e.g. fostering stronger and longer lasting relationships, bridging the "summer gap," encouraging parental involvement. The model specified a core of essential elements—new or different practices intended to achieve each of these aims. The model

also included a set of recommended (optional) practices to augment the chances for success with each aim. This development stage provided all contributors (researchers and practitioners) an equal opportunity to voice their opinions, share their experiences and shape the model that was being developed. Researchers could share findings from their own work and the broader research literature, while practitioners could discuss whether and how well that suggestion could work “on the ground.” This process was managed extremely well and it seemed that the model developed was truly research-based, and at the same time reflected practitioner wisdom.

From the inception of the project, the plan was to evaluate the ESBM model with a pilot project involving a specified number of chapters before actively encouraging its adoption throughout the national network. The pilot implementation and evaluation project was conducted internally, managed by BBBSA’s Director of Research and Evaluation. As research consultants, we offered advice on issues such as study design, assessments and measures, data collection procedures, and analysis plans. The evaluation employed an experimental design with random assignment at the agency level after blocking into groups with similar characteristics. After the ESBM model was created, BBBSA made it available as a document to all agencies within the network. Because agencies in the control group had access to the model, the evaluation demonstrates the effect of supported implementation of the model rather than just knowledge of the model.

In recognition of their contributions, the six design agencies were invited to become pilot implementation sites. Other chapters that met certain eligibility criteria, particularly use of the BBBSA Agency Information Management (AIM) system for tracking mentor and mentee program participation, were invited to apply as implementation sites. Chapters with an interest in implementing the ESBM model were oversubscribed, blocked into groups based on factors such as size and geographic location, and then randomly assigned to study condition. Only these randomly assigned chapters were included in the final analysis of the pilot. Support for implementation came in three forms: 1) financial grants to implementation sites for staff efforts to collect evaluation data from program participants; 2) training of program leaders and staff on the ESBM model; and 3) ongoing problem-solving and encouragement through regular phone conferences with teams of implementing sites coordinated by the BBBSA Director of Research and Evaluation.

Data collection conducted specifically for the pilot project occurred only in implementation sites. Intervention versus control group comparisons on the outcome of match retention were based on routine administrative program data collected through the AIM system at all chapters in the study. Although we did not directly oversee data collection, it seemed to progress smoothly. Implementation data were collected by the Director of Research and Evaluation at regular intervals on a range of topics through phone conferences with participating agencies. These qualitative data were collected in a standardized way,

yielding rich information on a wide variety of topics that could be tapped later based on agency, practice (e.g., summer meetings, support) or topic/issue (e.g., challenges, strengths). In fact, one of us was so impressed with the quality and organization of the resulting data that she has adopted this data collection technique for her own qualitative work with other mentoring programs. Response rates for agency-collected data were, unfortunately, lower than we had hoped, despite oversight and encouragement by BBBSA. Our first-hand experience working directly with other mentoring organizations trying to collect similar data suggests that agencies are simply not set up to yield strong response rates for an external “add-on” study (regardless of prodding, encouragement, incentives, etc.). Hiring outside survey administrators is likely the best approach for collecting data directly from program participants.

Implementation of the ESBM model successfully achieved the primary goal of improving SBM match retention, i.e. maintaining relationships over the summer break and continuing in the next school year. In the year prior to ESBM model implementation, agencies in the control group had an average retention rate of 43%, whereas the agencies randomly selected to implement the model had an average rate of 33%. In the year following implementation of the ESBM model, the control group agencies showed little change in the average retention rate (40%). However, the intervention agencies posted a substantial increase in average retention rate from 33% to 55%. One could argue, because the national office encouraged agencies to increase match length, that improvements in the intervention agencies simply reflect their leaving matches open longer before officially closing them. However, all agencies nationwide were encouraged to increase match length; thus, the fact that the control agencies did *not* improve their retention rates, supports the conclusion that the ESBM model and the national office’s support of the model led to the improvements measured.

As research consultants, we have been very impressed with the commitment of the BBBSA organization to fully embrace an evidence-driven approach to program improvement. In fact, we believe BBBSA is exemplary in this regard. The original SBM impact study was viewed as an opportunity to identify program strengths and weaknesses and to learn valuable lessons for program development. As a response to this opportunity, the ESBM pilot project was thoughtfully planned, well executed, and rigorously evaluated. The ESBM project represented a major undertaking involving multiple agencies, dozens of professional staff, and over a thousand program participants. It required substantial organizational capacity on a national scale. Most importantly, the ESBM pilot project demonstrated how knowledge, effort, and resources could be marshaled to make a meaningful difference in program quality. We are pleased to have been associated with this initiative, which truly “moved the dial” in a definitive manner.