Mentoring Connector

Affiliate Partner Administrator Manual

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***Highlighted sections represent new enhancements to the Mentoring Connector!**

Need Help? Email connector@mentoring.org

Partner Administrator Overview

Thank you for serving as a Partner Administrator in the Mentoring Connector, the only national database of mentoring programs. By administering your account, you're helping local programs more effectively reach out to prospective volunteer mentors, and broadening public awareness of mentoring programs in your area.

Several hundred prospective volunteers use the Mentoring Connector each month to find mentoring programs in their community. Through this referral system, prospective volunteers can find information about and contact local mentoring programs. Programs will be notified by email when someone has inquired into becoming a mentor and can respond to that person directly through the system. **As a Partner Administrator, you play a vital role in ensuring that this system is an effective means of volunteer recruitment for programs in your region.**

This manual will explore the following:

1. **The role of a Partner Administrator**
2. **How to approve and deny pending programs**
3. **How to use Mentoring Connector features**
4. **How to edit and customize email templates**

Affiliates are in a unique position to verify or question information submitted by local programs based on their familiarity with the regional mentoring community. Partner Administrators review all program submissions from their region and approve or deny them for public listing. We ask that affiliates also monitor programs' responses to volunteers and follow up with unresponsive programs accordingly. You can find more information about reviewing program listings and following up with unresponsive programs later in this manual.

Website Access

The Mentoring Connector website is best accessed from a desktop or laptop computer via most website browsers such as Google Chrome, Mozilla Firefox and Internet Explorer. If you are using a MacBook laptop, Safari should just as well as other browsers. However, tablets, iPads and mobile devices will not have the full functionalities needed to support your role in the Mentoring Connector. We do not recommend using such devices as a primary source to utilize this website as you may experience issues clicking buttons and using other functions.

Program Approval

Thousands of programs submit listings to the Mentoring Connector every year, but we strive to ensure that only programs that meet baseline quality standards are publicly searchable.

When a program is submitted, it goes through an automated screening process to make sure it meets the minimum requirements to be listed:

1. Programs must perform background checks on prospective volunteers
2. Programs must have a minimum match commitment
3. Programs must do some mentor training

If a program does not meet one or more of these requirements, the Program Administrator will receive an automated email stating that the program has been denied for public listing. Program Administrators may edit their program information and resubmit the listing at any time.

The program will remain in the Mentoring Connector but will not appear for prospective volunteers searching the database. If a Partner Administrator wishes to override this automated denial, he or she may do so by editing the program listing and clicking “Save & Approve.”

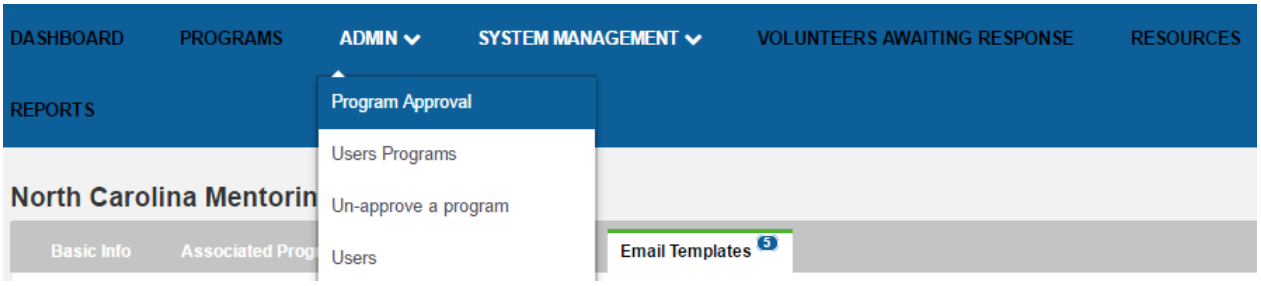
When a local program has passed the automated screening, the Partner Administrator will be notified of the new program submission. Partner Administrators will manually review the listing, paying special attention to:

1. Type(s) of background checks indicated
2. Match meeting frequency and minimum match commitment
3. Volunteer and mentee ages served
4. Program description
5. Mentor description

Sometimes inconsistencies or incomplete/questionable responses in these areas are due to data entry errors, but some programs are not ready to begin accepting volunteers, or fail to meet baseline standards for mentoring programs. All program records submitted will be kept in the database, but Partner Administrators’ manual screening will determine whether a program is publically searchable in the Mentoring Connector. We recommend that Partner Administrators only approve programs that align with the Elements of Effective Practice for Mentoring.

To review and approve pending programs:

1. Select Program Approval under the Admin tab (pending means the programs is awaiting review)



2. Click on a program's name to review the listing
3. Once you've finished reviewing the program information, click "Close"
4. Click either "Approve" or "Deny" beside the program's name. A notification e-mail will be sent to the program instantly from connector@mentoring.org (you can find all email templates later in this manual).

Following Up with Unresponsive Programs

In order to maintain a reliable and responsive database, we ask that Partner Administrators only retain programs that continually respond to volunteers**. To remain in the Mentoring Connector, programs must respond to volunteers within ten days of the initial request**. If a program has not responded to two volunteers for ten days, we ask that Partner Administrators reach out to the Program Administrator and request that the program responds to the volunteers.

If the program still doesn't respond, please "deny" this program so it can no longer receive volunteer inquiries. The program will no longer be publically searchable, but will remain in the system so it can be reactivated should the program demonstrate its responsiveness.

Below is the recommended process for denying unresponsive programs:

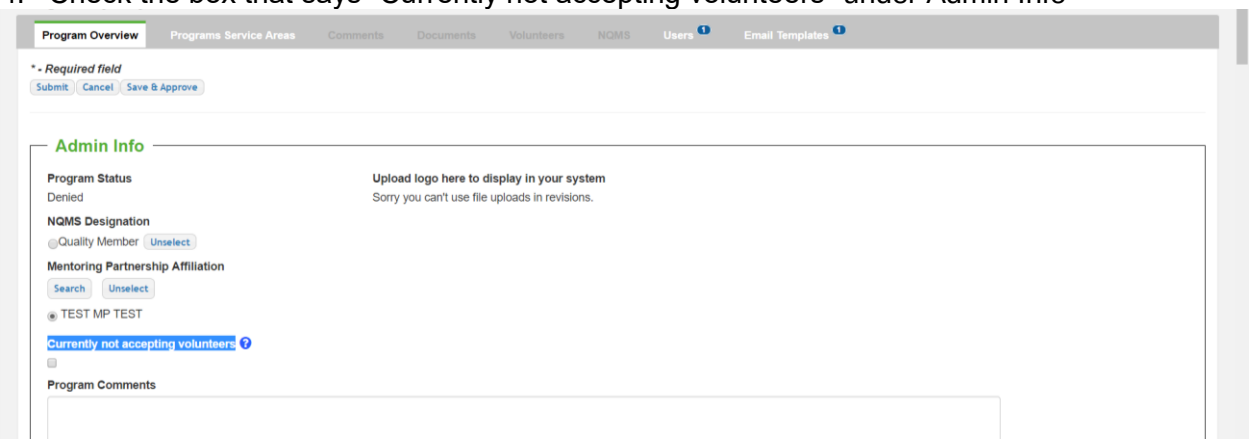
1. When a volunteer makes an initial inquiry into a mentoring program, the program is automatically notified that they have a new volunteer awaiting response
2. The program is sent an automatic reminder email after seven days without a response, and the Partner Administrator is notified after ten days
3. After receiving notification that a program isn't responding to a volunteer, the Partner Administrator should contact that program and encourage them to reply to the volunteer
4. If the program doesn't respond to your communication and hasn't responded to two volunteers within a ten-day timeframe, send the Program Administrator one more email alerting them that you will deny their program listing.
5. If the program still doesn't respond, you can deny the program by:
    a. Clicking on the program's name
    b. Clicking the "edit" button
    c. Clicking "Save & Deny." The program will remain in the system but will no longer be publically searchable.

Programs Not Accepting Volunteers

Many programs only recruit mentors at specific times in the year, and other programs may reach volunteer capacity. If a program would like to appear in the Mentoring Connector, but is temporarily not accepting volunteers, the program may indicate this on their profile. The program will still appear when someone searches the database, but a red banner will display that states “Currently Not Accepting Volunteers.” Volunteers will not be able to contact the program through the Mentoring Connector while this is selected. Program Administrators can find instructions on how to do this in the Program Administrator Manual.

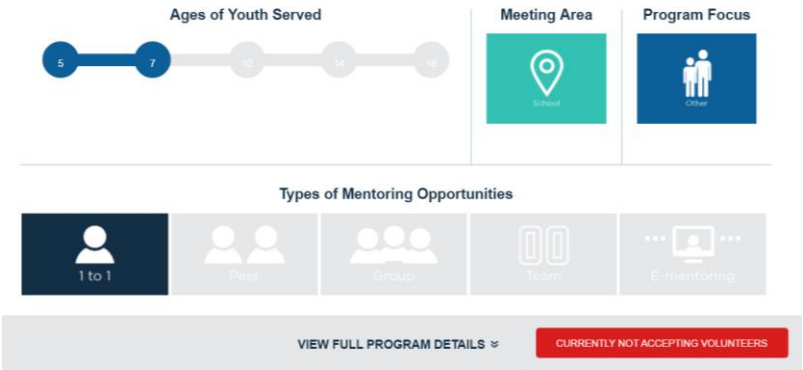
Partner Administrators can also indicate this on a program’s profile by doing the following:

1. Sign in to your account
2. Click the “Programs” tab in the blue bar
3. Search for the program and click “Edit” beside its name
4. Check the box that says “Currently not accepting volunteers” under Admin Info



5. Click “Submit”

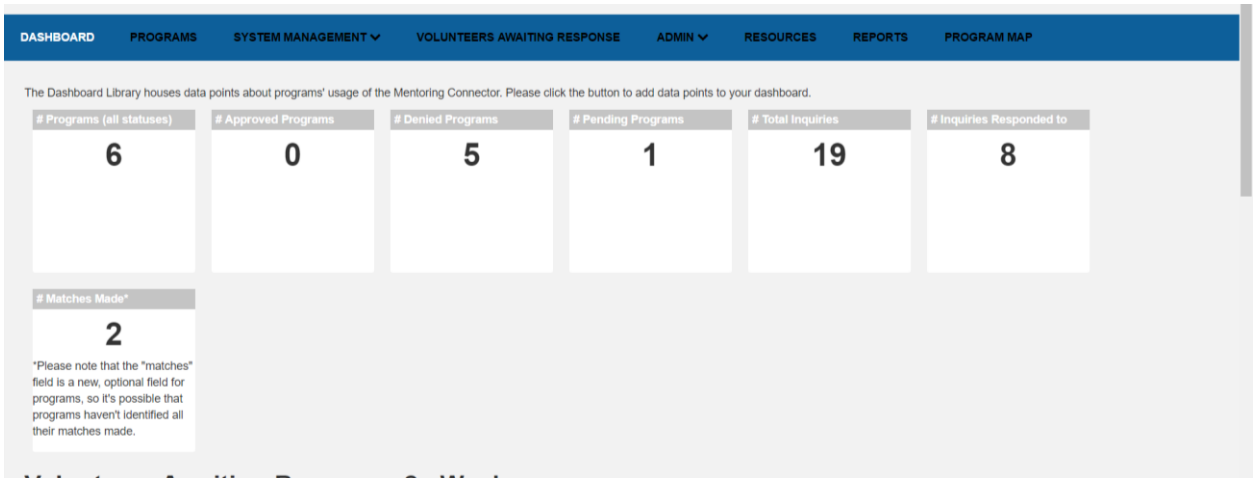
The program will still appear when a volunteer searches his or her service area, but it will indicate that the program is not currently accepting volunteers where the “Contact Program” button formerly appeared.



Dashboard Widgets

You are now able to see specific data points about programs' usage of the Mentoring Connector by logging in and clicking the “Dashboard” tab in the blue bar. These data points include:

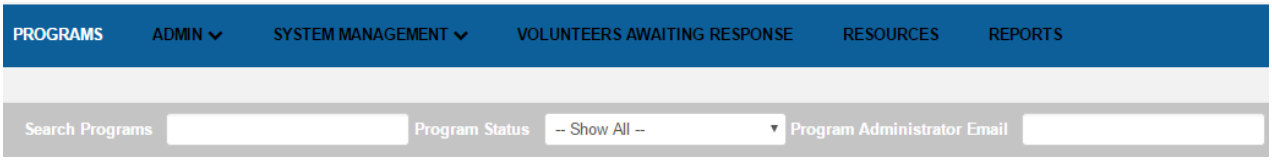
1. **# of programs in your region** - all programs associated with your affiliation (including approved, denied and pending programs)
2. **# of approved programs**
3. **# of denied programs**
4. **# of pending programs**
5. **# of volunteer inquiries** - how many volunteers have inquired to programs in your region
6. **# of inquiries responded to** – how many of the volunteer inquiries have been responded to
7. **# of matches made** – how many volunteers have been successfully matched



All seven data points will appear when you first visit the Dashboard, but you can remove any by hovering over the box you wish to delete and clicking the trash icon. The data point will disappear, but you can add it back later by returning to the Dashboard page and clicking the “Dashboard Library” button. This button will only appear if one or more data points has been deleted.

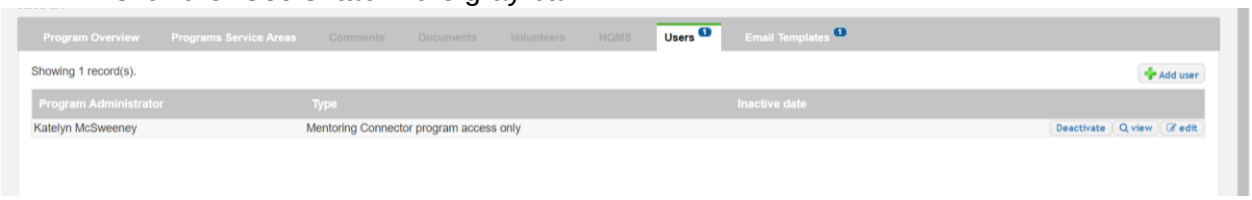
Find a Specific Program Entry

To find a specific program entry, type the Program Name or Program Admin Email in the search boxes above the programs list on the Programs screen to activate smart searching.

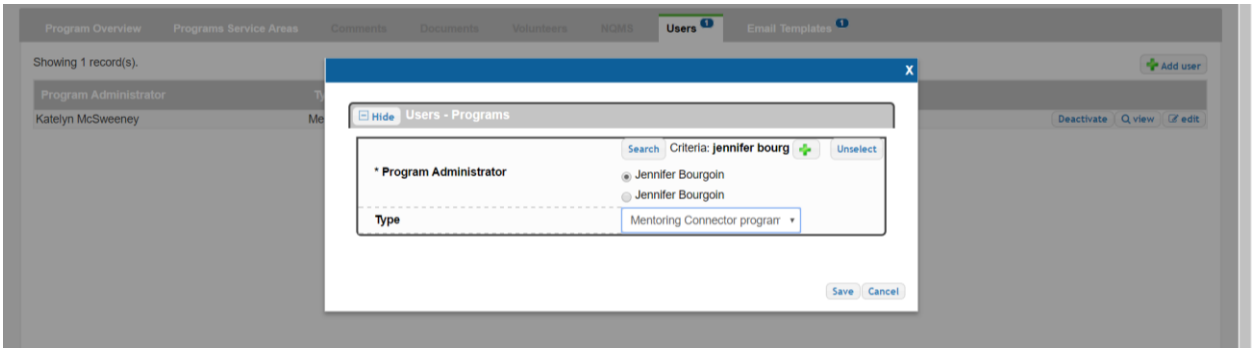


Change the Program Administrator for a Program

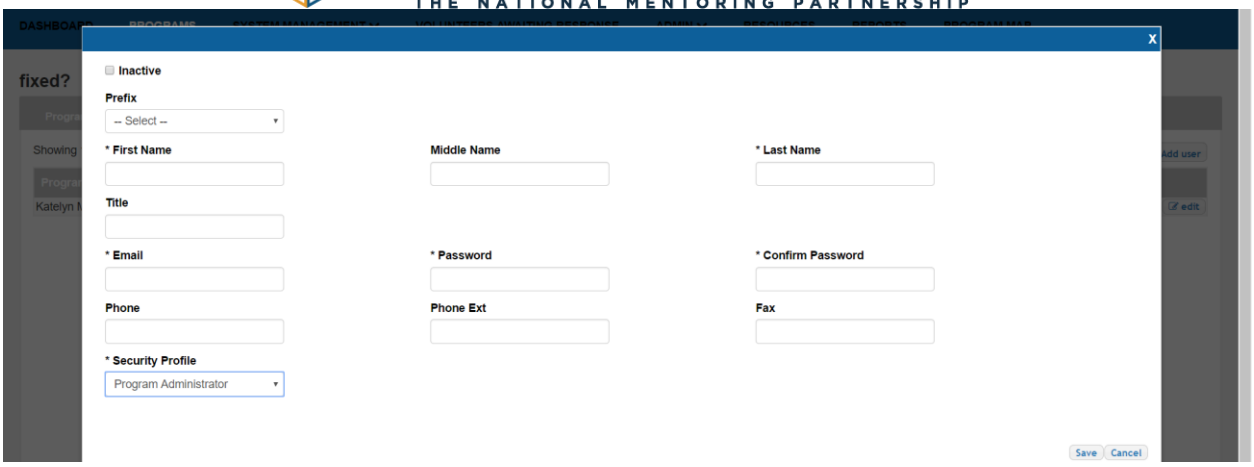
1. Click the “Programs” tab and select the program
2. Click the “Users” tab in the gray bar



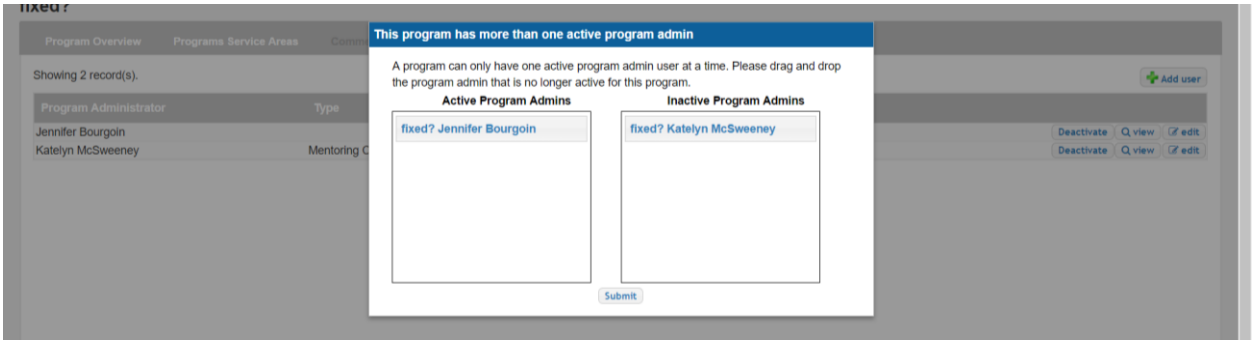
3. You will see the current Program Administrator
4. Click “Add user”
5. If the new Program Administrator is in the system for another program already, click “Search” and type in his or her name. Select the correct person.



6. If the new Program Administrator is not in the system yet, click the green + button to add a user entry. Note you will need to create a password for the new Program Administrator. Click “Save.”



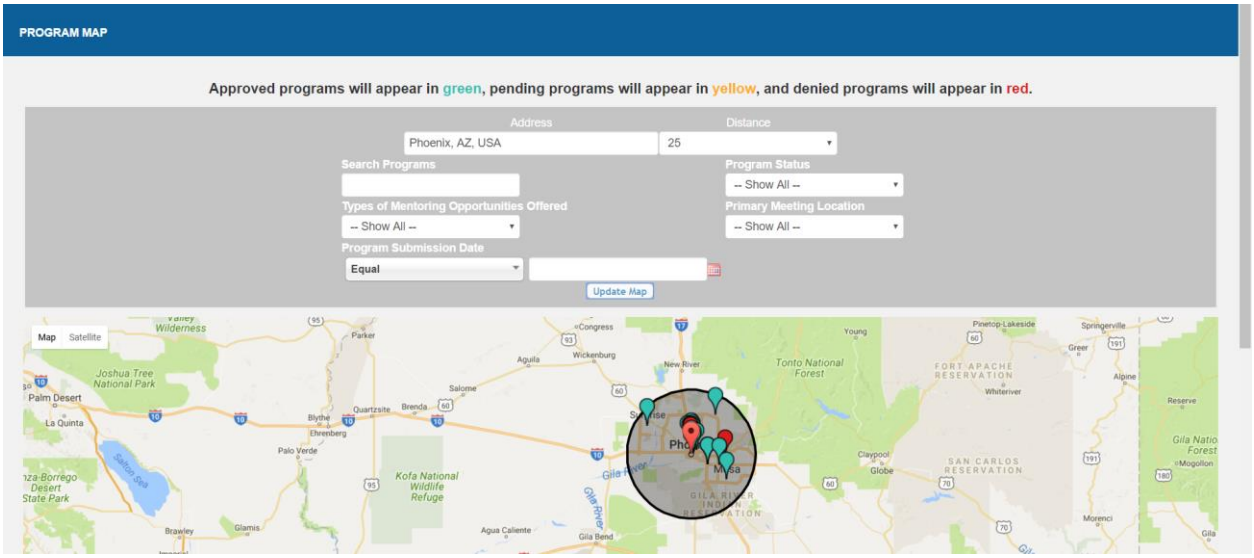
7. **Make sure "Mentoring Connector program access only" is selected for "Type."** Click the "Save" button to submit changes
8. You will see a pop-up screen notifying you that only one Mentoring Connector Program Administrator can be active per program, and asking you to select which user you'd like to deactivate for that account. Drag and drop the Program Administrator that is no longer active for this program into the "Inactive Program Admins" box.



9. Click "Submit"

Program Map

As a new feature, all affiliates will be able to view the mentoring programs in their region in the form of a map. This is designed to help you view the mentoring programs across your region in various ways. You will find access to this map by clicking the new button titled "PROGRAM MAP."



Please note that the Program Map may initially default to Denver, Colorado, but you can find programs in your region by typing in your state's name into the "Address" field. You can type in a specific city if you'd like to see what programs exist in a smaller area. Clicking on a pinpoint will bring up basic information about that program.

You can filter the programs that appear by the following:

- Program Name
- Types of Mentoring Opportunities Offered (One to One, Group, Peer, etc.)
- Program Submission Date
- Distance
- Program Status (Approved, Denied, Pending)
- Primary Meeting Location (Agency, Community, School, etc.)

The map will only show programs associated with your Partner account (likely just programs in your state/region). To view all programs in your state, type in your state's name and set the distance to 500 before clicking "Update Map." This will display all programs associated with your account.

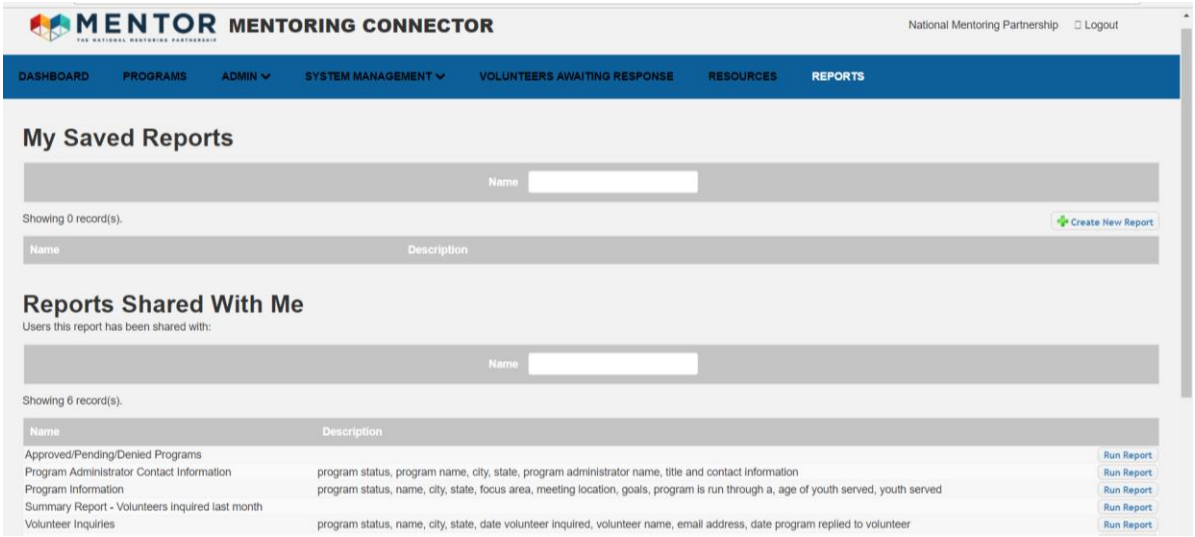
Running Reports

The Mentoring Connector enables Partner Administrators to run reports on programs in their region to examine trends in program models, easily find Program Administrator contact information, and analyze the success of volunteer recruitment and program response rates. Reports can include any field the program or volunteer has submitted in the program application or volunteer inquiry.

To learn more about how to run reports:

1. Click the “Reports” tab in the blue bar.
2. Click the “Create New Report” button between the two gray bars
3. Scroll down the page to where it says “Help Guide” and click that button.

We have also shared several reports with you for your convenience. You can find these reports by clicking “Reports” in the blue bar and scrolling down to “Reports Shared with Me.”



- Approved/Pending/Denied Programs – **this report breaks down the approved, pending and denied programs in your region**
    a. Fields: Program Status, Program Name, Program City, Program State

- Program Administrator Contact Information – **this report provides you with Program Administrator contact information for every program**
    b. Fields: Program Status, Program Name, City, State, Program Administrator Name, Title, Phone Number and Email Address

- Program Information – **this report enables you to analyze basic information about programs, including their focus areas, meeting location, goals, etc.**
    c. Fields: Program Status, Program Name, City, State, Program Focus Area, Primary Meeting Location, Goals, What the Program is Run Through, Age of Youth Served, Youth Served

- Summary Report – Volunteers inquired last month – **this report shows the number of volunteer inquiries each program has received over the past two months**
    d. Fields: Total number of volunteer inquiries last month, total number of volunteer inquiries this month

- Volunteer Inquiries – **this report shows all volunteer inquiries over the last month and the date the program responded (if the program responded). This report is currently set to show you last month's inquiries.**
    e. Fields: Program Status, Program Name, City, State, Volunteer Name, Volunteer Email Address, Date Inquired, Program Responded Date; FILTER: Last Month, dynamically.

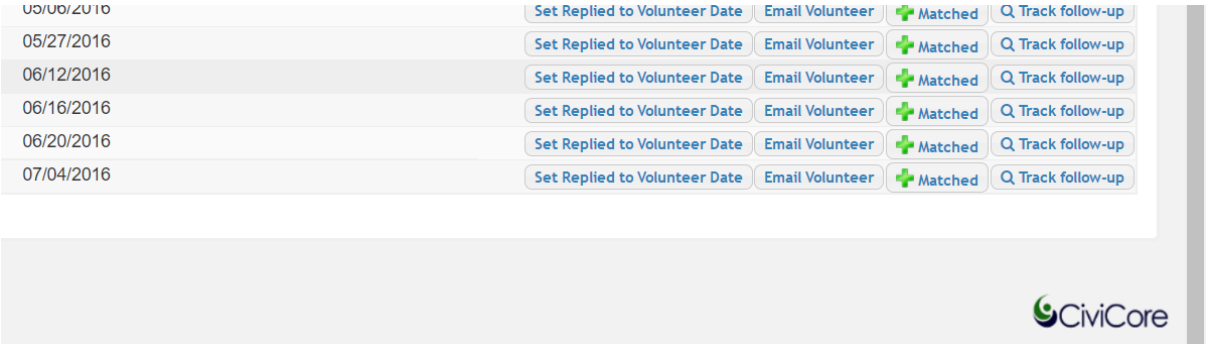
To run a report, simply click "Run Report" beside the report's name, and the results will appear.

Set a Replied-To Date

In some cases, a program may contact a volunteer outside of the Mentoring Connector system. Some volunteers inquire through the Mentoring Connector as well as directly to the program, and programs may respond to the volunteer directly instead of going through the Mentoring Connector. If this happens, you can click the new "Set Replied To Volunteer Date" to indicate that the program has responded to the volunteer inquiry. This will remove the volunteer from your queue of volunteers awaiting reply, and will stop reminder emails for this volunteer.

To click the "Replied-To" date button:

1. Click the "Programs" tab in the blue bar
2. Search for and click on the correct program
3. Click on the "Volunteers" tab in the gray bar
4. Find the volunteer that was responded to, and click "Set Replied-to Volunteer Date"
5. Today's date will appear

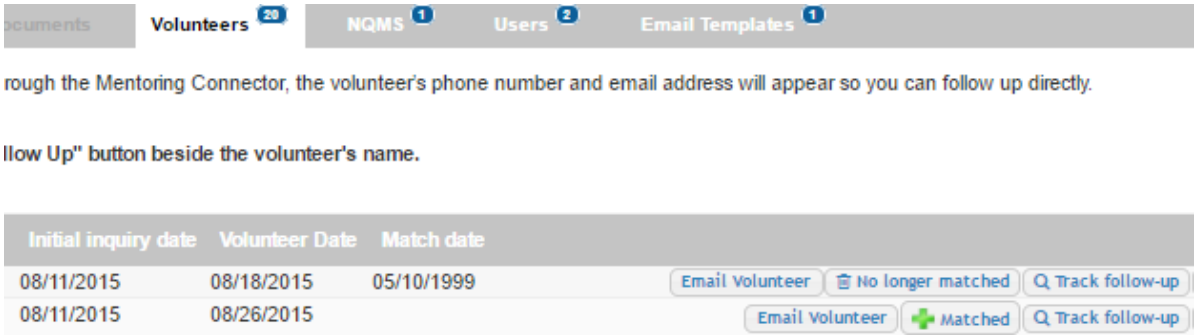


New Program Administrator Features

To review how Program Administrators can use their accounts, please see the Program Administrator Manual. There are some new Program Administrator features that we want to make you aware of:

Track Follow-Up

Mentoring programs will now be able to track additional follow-up contacts with potential volunteers. When the program looks at its list of volunteers through the volunteers tab, there is a button to the right called “track follow-up.” This button allows Program Administrators to write and save notes about additional contact attempts, such as phone calls, emails and in-person interactions.



Mark a Match

Programs can now “mark a match” to indicate that a volunteer has been matched with a mentee. This button also appears in the volunteers tab, and will show up with a green plus sign that says “Matched.” Programs can click this button and select the date the match was made.

National Organizations

National organizations’ headquarters may now have their own National Accounts, which allows them to view affiliates’ accounts and follow up with unresponsive programs. One representative from each national mentoring organization can log into the Mentoring Connector to run reports on relevant data, contact unresponsive programs, and update their Program Administrator contact information should there be staff turnover.

Service Areas

The Mentoring Connector is now searching all the program service areas (zip codes) listed in an account instead of just the headquarters zip code. Programs will now appear when a potential mentor types in any of the service areas listed in any account.

We've noticed that some programs have included more zip codes than they serve, and we ask that all Partner Administrators review accounts in their region and update Service Areas by doing the following:

1. Sign in to your account
2. Click "Manage Program Service Areas" beside a program's name
3. Add or remove zip codes

Please make sure that only zip codes the program serves directly or has a site are included. This will ensure that programs only receive inquiries from volunteers in their area.

Mentoring Connector Standard Email Templates

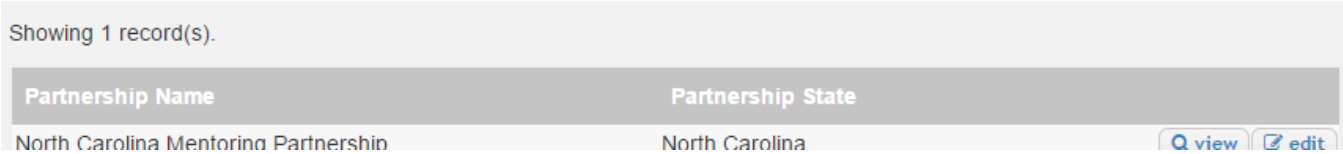
Below you will see all of the various email templates that will be sent out from doing certain actions in the Mentoring Connector. You will learn how to customize these templates should you desire to do so.

Partner Administrators can create custom versions of any/all of these five templates. The system will use a customized template, if one exists, when sending an email to a program in your state. If no custom template exists, the system will use the standard template.

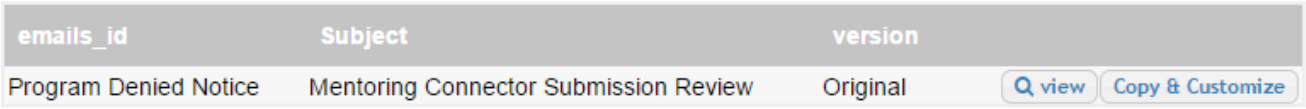
Affiliates may wish to customize the email signatures on these emails and to add info on their own resources for mentoring programs.

Creating Custom Email Templates

1. Click on System Management, then “Affiliates.”
2. Click the Edit button beside your information on the right side of the screen



3. Click on “Email Templates” on the top of the gray dashboard horizontal bar.
4. Click on the List Templates button beside the email you wish to create a custom version of.
5. On the popup screen, click the Copy & Customize button



6. An editing window will open. You can make edits to the email subject line, body, and signature

Be very careful not to make any changes to the query parameters (highlighted in yellow below) enclosed within the standard template copy – those strings represent merge fields and must remain exactly as they are in the standard template in order to pull in the appropriate program administrator name and program name when sent by the system. Standard language for the five templates that are customizable by Partner Admins is included on pages 6-10 of this document.

Template Title: Program Approval Notice

Subject line: ^@query.programs.programName^ is now listed in the Mentoring Connector

Dear ^@query.programs.admin_firstName^ ^@query.programs.admin_lastName^,

We are pleased to let you know that your youth mentoring program, ^@query.programs.programName^, is now an active member of MENTOR's Mentoring Connector, the largest volunteer referral system in the US devoted solely to youth mentoring opportunities.

Thousands of prospective volunteers use the Mentoring Connector each month to find mentoring programs in their community. Through this referral system, your program information will be made available to those searching for programs within your service area, and you will be notified by email when prospective volunteers express an interest in your program. Remember to allow email from mentoring.org in your email application so you will not miss these notices.

We ask that you log into the Mentoring Connector to respond to prospective mentors directly within 2---3 days. If you find that you are unable to contact prospective volunteers, please let us know right away so that volunteer inquiries do not remain unanswered.

To ensure that your program remains active in our Mentoring Connector, review and update your program profile at least once every three months.

To do this:

1. Go to connect.mentoring.org/admin
2. Log in with your username (email) and password (password is case---sensitive)
3. Make sure the administrator and volunteer contact info for your program is up---to---date, and that all program information is complete.

Remember to update your program profile after staff transitions to ensure that your volunteer inquiries are not lost due to outdated contact info.

There are many helpful, free resources available to your program at mentoring.org, including our Toolkit, "How to Build a Successful Mentoring Program Using the Elements of Effective Practice™". This comprehensive Toolkit, available in English and Spanish, includes tools, templates and advice to help to ensure quality mentoring. The Toolkit is available to download at no charge, and will save you time and effort as it contains materials and information you need to develop and maintain a safe and effective youth mentoring program. Find it online at http://www.mentoring.org/program_resources/elements_and_toolkits

Should you have any questions about the Mentoring Connector or need further assistance, please do not hesitate to contact us. Thank you for your good work in the field of youth mentoring.

Template Title: Program Automated Denial

Subject Line: Mentoring Connector Submission Review

Dear ^@query.programs.admin_firstName^ ^@query.programs.admin_lastName^,

Thank you for registering ^@query.programs.programName^ with MENTOR's Mentoring Connector. While we greatly appreciate your efforts to positively impact your community, we are unable to make your program listing available for public searches at this time.

Before a registered mentoring program is included in our web---searchable database of volunteer opportunities, it is reviewed using MENTOR's Elements of Effective Practice for Mentoring™. The Elements are research--- and experience---based comprehensive guidelines for operating a safe, effective youth mentoring program. Mentoring programs must be well---designed and organized to create safe and long---lasting relationships for young people. Learn more about the Elements here: http://www.mentoring.org/program_resources/elements_and_toolkits

We encourage you to reach out to an excellent local resource, your local Mentoring Partnership. MENTOR's network of affiliate Affiliates support their local mentoring field through training, technical assistance, advocacy, and supporting aligning with best practices. Find your Mentoring Partnership on the MENTOR website: http://www.mentoring.org/about_mentor/mentoring_partnerships/

We also encourage you to consider requesting technical assistance through the National Mentoring Resource Center. In 2013, the Department of Justice Office of Juvenile Justice and Delinquency Prevention (OJJDP) selected MENTOR: The National Mentoring Partnership to develop the National Mentoring Resource Center. This clearinghouse of resources for mentoring practitioners includes the availability of no---cost technical assistance, provided in order to help mentoring programs receive customized support and implement quality practices. Learn more here: http://www.mentoring.org/program_resources/national_mentoring_resource_center

If you're able to restructure your program in the future to align with these best practice standards, please feel free to contact us with additional information (a link to your program's web site, a program brochure, etc) and we'll re---evaluate the program for inclusion in the web---searchable Mentoring Connector at that time.

Best,

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MENTOR: The National Mentoring Partnership 201 South Street, Sixth Floor | Boston, MA 02111

Phone: 617.303.4600 | Web site: www.mentoring.org

Template: Program Denied Notice (Denied after manual review)

Subject Line: Mentoring Connector Submission Review

Dear ^@query.programs.admin_firstName^ ^@query.programs.admin_lastName^,

Thank you for registering ^@query.programs.programName^ with MENTOR's Mentoring

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Best,

MENTOR: The National Mentoring Partnership 201 South Street, Sixth Floor | Boston, MA 02111

Phone: 617.303.4600 | Web site: www.mentoring.org

Template Title: Volunteer Referral

Subject Line: Prospective volunteer for ^@query.programs.programName^

Hello from MENTOR and the Mentoring Connector!

We have a volunteer referral for you! Please log in to the Mentoring Connector at connect.mentoring.org/admin within 2 business days to respond to this prospective volunteer about volunteering with your program.

Thank you for your continued efforts in mentoring. In partnership, we will connect more of our young people with caring adult mentors and increase the power of mentoring!

If you have any questions regarding this service, please don't hesitate to contact us! Thank you!

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MENTOR: The National Mentoring Partnership 201 South Street, Sixth Floor | Boston, MA 02111

Phone: 617.303.4600 | Web site: www.mentoring.org

Template Title: Volunteer Referral Reminder

Subject Line: Reminder: You have a volunteer awaiting response

Dear ^@query.programs.admin_firstName^ ^@query.programs.admin_lastName^,

Several days ago, a prospective volunteer expressed interest in becoming a mentor with

^@query.programs.programName^.

Please log in to the Mentoring Connector to respond to this volunteer inquiry at your earliest convenience. If you're having trouble accessing the system, or are not able to respond to this volunteer for any reason, please let us know right away by emailing us at connector@mentoring.org.

Thank you,

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MENTOR: The National Mentoring Partnership 201 South Street, Sixth Floor | Boston, MA 02111

Phone: 617.303.4600 | Web site: www.mentoring.org