



## **BIG BROTHERS BIG SISTERS STANDARDS OF PRACTICE FOR INDEPENDENT AGENCIES**

### **BOARD/GOVERNANCE STANDARDS 1-5**

#### **Preamble:**

Standards 1 through 5 of the Standards of Practice (“Standards”) establish minimum governance standards for each Big Brothers Big Sisters (“BBBS”) agency (“Agency”) Board of Directors (the “Board”). Board Members are fiduciaries who have a legal responsibility to represent the best interests of the organization and those it serves by ensuring that the Agency’s mission is executed through ethical and legal governance and management policies, and ensuring the Agency has adequate resources to advance its mission. An effective, decision-making Board can strengthen an Agency in many ways.

These Standards address some of the governance roles and responsibilities of these mission-critical leaders as well as of Agency leaders. These include, but are not limited to: 1) carrying out the Agency’s mission, vision, and accountability statement; 2) governance, which includes adopting and enforcing Agency bylaws; ensuring compliance with local, state, and federal laws as well as with performance expectations, the Standards of Practice, and the Membership Affiliation Agreement; overseeing the Chief Executive Officer/Executive Director; and ongoing board member recruitment and retention, engagement, and development; 3) Strategic Planning and Fund Development; 4) Governance and Financial Policies; and 5) Finance Procedures.

In addition to complying with these Standards, Agencies must ensure that they remain familiar with and are following state and local laws and requirements, developments in federal laws, and any provisions required by grants.

#### **Required Documents:**

The Standards provide more detail and guidance on the required policies and procedures and there are sample documents available on BBBS Connect. But in summary, Standards 1-5 require the following plans, policies, and procedures:

- Bylaws (Standard 2.B)
- Board Development Plan (Standard 2.E)
- Board-Approved strategy with accompanying written annual plan to achieve programmatic, financial, and fund development goals (Standard 3)
- Board-Approved Governance and Finance Policies (Standard 4):
  - Governance Policies, including Succession Plan and Code of Conduct (Standard 4.A)
  - Executive Limitations Policies (Standard 4.B)
  - Finance Policies (Standard 4.C)
  - Risk Management Policies (Standard 4.D)



- Finance Committee-Approved (and/or Board-Approved) Finance Procedures (Standard 5)

**Standard 1: Vision, Mission, and Accountability**

Each Agency must have the same vision, mission and accountability statement as that set by the Nationwide Leadership Council (“NLC”) and Big Brothers Big Sisters of America (“BBBSA”) Board.

**Standard 2: Board of Directors Roles and Responsibilities**

- A. Governance: Each Agency must have a Board that is charged with governance of the Agency.
- B. Bylaws: Each Board must develop, approve and operate in accordance with written bylaws that comply with state nonprofit corporate laws. Bylaws should include, at a minimum:

Required Bylaws Provision	Items to Include in Provision
B-01. Purpose, BBBSA-approved name, and Agency service area	
B-02. Governing Authority of Board	<ul style="list-style-type: none"> <li>• Function and Roles and Responsibility</li> <li>• Definition of Fiduciary Duties</li> <li>• Authority to manage corporation and its finances</li> <li>• Process for oversight of the Chief Executive Officer (“CEO”)/Executive Director (“ED”) and provisions for delegated powers</li> </ul>
B-03. Meetings	<ul style="list-style-type: none"> <li>• Number per year</li> <li>• Attendance expectations for members (including whether members may participate electronically or telephonically)</li> <li>• Provision to call an emergency board meeting</li> <li>• Parliamentary procedure (rules to govern meetings)</li> </ul>
B-04. Board Membership	<ul style="list-style-type: none"> <li>• Qualifications</li> <li>• Number (minimum-maximum range) of board members</li> <li>• Terms and term limits (if any)</li> <li>• Process for board member election</li> <li>• Procedure for resignation or removal of a board member or officer</li> </ul>

Required Bylaws Provision	Items to Include in Provision
	<ul style="list-style-type: none"> <li>• Procedure for filling vacancies</li> </ul>
B-05. Nondiscrimination Provision	
B-06. Provisions for the existence of other advisory boards, if applicable (e.g., honorary trustees, satellite advisory boards, etc.), and what requirements/ authority these ancillary groups have	
B-07. Voting	<ul style="list-style-type: none"> <li>• Define quorum</li> <li>• Whether ex-officio members permitted, and any authority</li> <li>• Electronic voting provision (whether votes may be conducted electronically)</li> <li>• Hung board decisions</li> </ul>
B-08. Officers	<ul style="list-style-type: none"> <li>• Officer titles, qualifications and descriptions of role</li> <li>• Terms of office and number of consecutive terms permitted (term limits)</li> <li>• Process for selecting officers</li> </ul>
B-09. Committees	<ul style="list-style-type: none"> <li>• Standing committees and description of authority and role</li> <li>• Ad Hoc committees – how determined and provision for them to exist if desired</li> <li>• How a committee may be created or dissolved</li> </ul>
B-10. Indemnification	
B-11. Process for Amending Bylaws	
B-12. Books and Records	<ul style="list-style-type: none"> <li>• Requirement that books and records and minutes kept and where</li> </ul>
B-13. Procedure for Corporate Dissolution and Distribution of Assets	
B-14. Finances	<ul style="list-style-type: none"> <li>• Fiscal year</li> <li>• Contractual and Loan authority</li> </ul>

C. Compliance: Each Board must certify, in writing through the self-assessment verification letter, to BBBSA on an annual basis that the Agency is:

1. Incorporated and in good standing as a not-for-profit entity in the state in which the Agency's corporate office is located and (if applicable) qualified to do business as a foreign corporation in any other state(s) within its Service Community Area;
2. Operating in compliance with applicable federal, state, and local laws, including those of the municipalities/counties/states in which the Agency's operations exist, including operating in compliance with applicable federal, state, and local charitable registration requirements and fundraising ordinances;
3. Retaining its not-for-profit tax-exempt status with the Internal Revenue Service ("IRS") as a 501(c)(3) entity;
4. Developing, reviewing, and updating, as necessary all written plans, policies, and procedures that required Board approval, including, but not limited to, those required in these Standards; and
5. Operating in compliance with terms of the Membership Affiliation Agreement with BBBSA and the Standards of Practice.

D. Chief Executive Officer/Executive Director Oversight: The Board has the responsibility for CEO/ED oversight and executive leadership succession, as specified in the Agency Bylaws. This includes, at a minimum:

1. Maintaining an up to date, written job description for the CEO/ED that clearly defines the CEO/ED's authority and role and responsibilities;
  - a. Effective with the implementation of this Standard, the job description must include the requirement that the CEO/ED have, at least, a bachelor's degree from an accredited college or university;
    - i. The Board must ensure that the CEO/ED has, at least, a bachelor's degree as set forth above. Under extenuating circumstances, the Board may submit a candidate who does not have a bachelor's degree to BBBSA for an exemption approval; in those rare situations, however, the CEO/ED candidate must have at least 10 years of relevant work experience.
  - b. The CEO/ED must be a full-time employee of the Agency, based on the number of hours identified by the Agency as constituting full-time status; other than in the case of an interim CEO/ED, the CEO/ED cannot be an independent contractor.
    - i. Pursuant to Standard 2.D.3.c, an interim CEO/ED cannot serve for more than 90 days without BBBSA's approval.
2. Evaluating the CEO/ED's compensation (per Standard 6C-03.i.a) and the CEO/ED's performance through a regularly scheduled, annual, written performance review

- process against agreed upon performance goals that include, at a minimum:
- a. Compliance with the Membership Affiliation Agreement and Standards of Practice;
  - b. Metrics based on the Agency's written, Board-approved strategy and annual plan required in Standard 3.
3. Implementing the following in the event of a change in executive leadership:
- a. Notifying BBBSA in writing within ten (10) business days of: a vacancy in executive leadership; the naming of an interim CEO/ED; and/or the hiring of a new CEO/ED;
  - b. Confirming that the new CEO/ED completes BBBSA's orientation for new CEOs/EDs within the first year of employment; and
  - c. Ensuring the CEO/ED position is not vacant for more than 90 days without BBBSA's approval.
- E. Board Development: Each Agency must have a Board-approved, multi-year, written Board Development Plan that is implemented by the Board and designated Agency staff and that addresses, at a minimum:
1. Clarity of roles and responsibilities relative to implementation of the Board Development Plan;
  2. Practices for identification and recruitment of potential new Board members that includes using sources and strategies that yield qualified, diverse Board candidates in the selection pool;
  3. Orientation process for new Board members;
  4. Succession plan for rotation of or resignation of officers;
  5. Annual written evaluation of individual and collective Board performance, with summary results presented to the Board. [\[Link to example on BBBS Connect\]](#)

### **Standard 3: Strategic and Annual Planning**

Each Agency must have a written, Board-approved strategy (which may take the form of a strategic plan, framework, or other similar structure) and a written annual plan to achieve programmatic, financial, and fund development goals. Strategies may be localized, but should not contradict with national BBBSA strategies and direction. The fund development component of the annual plan must identify Board and Agency staff roles and responsibilities and include measurable fundraising goals that are applied to multiple revenue sources to sustain a diversified funding base.

[\[Link to example on BBBS Connect\]](#)

**Standard 4: Board-Approved Governance and Finance Policies**

Each Agency must have Board-approved, written policies that are reviewed by the Board at least every three years or as policies are revised.

Required Policy	Purpose	Items to Include in Policy
<b>4A. GOVERNANCE POLICIES</b>		
A-01. Written Succession Plan		Set forth a plan in the event of CEO/ED resignation, termination, or leave of absence.
A-02. Code of Ethics/Code of Conduct		Code of Ethics may encompass other policies noted below in A-03 to A-08. <a href="#">[Link to example on BBBS Connect]</a>
A-03. Whistleblower and Disposition of Complaints	Form 990 & Sarbanes-Oxley	May be two separate policies; Whistleblower policy must include nonretaliation provisions and/or a reference to the retaliation policy in the Employee Handbook.
A-04. Conflict of Interest	Form 990 and state nonprofit statutes	
A-05. Record Integrity, Retention, and Destruction	Form 990 & Sarbanes-Oxley	Must include record retention and destruction schedules in accordance with all applicable federal, state, and local laws.  Must include document litigation hold procedure and employee's obligation to abide by such a request.
A-06. Lobbying and Political Activity	Form 990 & IRS Code 501(c)(3)	Policy must include prohibition of campaign activities (candidate support, electioneering)
A-07. Board Members and Agency Staff Serving as Volunteer Bigs		See Standard 9.M.
A-08. Fund Development		Must include guidelines concerning solicitations and use of funds.
<b>4B. EXECUTIVE LIMITATIONS POLICIES</b>		
B-01. Expenditure Approval Authority		Must include thresholds for multiple signatures and board-approval.
B-02. Lending and Lines of Credit		Must address who has the authority to commit Agency to loans or take out lines of credit on behalf of the Agency.

Required Policy	Purpose	Items to Include in Policy
<b>4C. FINANCE POLICIES</b>		
C-01. Role of the Board and/or Board Finance or Finance-Related Committees		Must include the role of an appropriate Board Committee (e.g., Finance or Audit) or the Board where such Committee is not practical, and a high-level process regarding the Committee's (or Board's) review of Agency financials, auditor selection and audit review, and Form 990 review. The policy must provide that the Form 990 be approved by the full Board.
C-02. Audit		All BBBSA Agencies (of which the minimum operating threshold is an annual budget of \$200k) are required to have an annual financial statement audit complete and submitted to BBBSA within 9 months of the Agency's close of corporate fiscal year. Policy should address that a minimum of every 5 years some form of rotation (personnel or firm) should be considered.
C-03. Liquidity Policy	New required footnote	Must include reserves policy, Line of Credit policy if applicable, approach to cash flow management, etc.
C-04. Gift Acceptance/ Donations Policy		Must include: <ul style="list-style-type: none"> <li>i. Types of gifts the organization will/will not accept;</li> <li>ii. Process for valuing and recognizing in-kind donations in accounting records;</li> <li>iii. Requirement that contributions comply with donor intent;</li> <li>iv. Acknowledgement of contributions per applicable tax code requirements;</li> <li>v. Decision-making process when acceptance of a gift is not otherwise covered in the policy.</li> </ul>
C-05. Investment Policy		Must be in alignment with state Uniform Prudent Management of Institutional Funds Act (UPMIFA) laws. Should also address endowed funds, if applicable.

Required Policy	Purpose	Items to Include in Policy
C-06. Capital Expenditure Policy		Must include threshold for capitalization.
C-07. Procurement Policy	Uniform Guidance (2 CFR 200)	Must include process for purchasing at various thresholds. If the organization receives federal funding, this should align with Uniform Guidance procurement rules.
C-08. Notification to BBBSA Re: Financial Standing		Policy addressing who within the organization is responsible for notifying BBBSA in the event of insolvency, intent to file bankruptcy, etc.
C-09. Credit Card Policy		Must outline what level of staff have corporate cards, receipt policy, and review of CEO/ED expenses.
C-10. Board Expense Reimbursement Policy		Must indicate types of expenses eligible for reimbursement and process/required documentation.
<b>4D. RISK MANAGEMENT POLICIES</b>		
D-01. Technology Security Policies and Workplace Practices on Data Privacy, Confidentiality, and Security		Confidentiality and privacy/security (including cyber security) of personnel, donor, financial, and program participant data.
D-02. Insurance Coverage		<p>Insurance Plan that specifies all insurance coverage secured, including: Accident, Agency Auto, Directors and Officers, Errors and Omissions, Sexual Abuse and Molestation, General Liability, Property, and Worker's Compensation.</p> <p>There may be other insurance policies that are appropriate for the Board to consider. At a minimum, agencies must have \$1,000,000 of Sexual Abuse and Molestation Coverage, which may be included in the Agency's Errors and Omissions form. This may not be sufficient for some agencies, however, and Boards are strongly encouraged to consult with insurance brokers on appropriate coverage levels. Boards are also strongly encouraged to consider umbrella insurance policies.</p> <p><a href="#">[Link to BBBS Connect]</a></p>

Required Policy	Purpose	Items to Include in Policy
D-03. Crisis Management Policy		Must include practices to address likely situations based on BBBS operations. Must include crisis communication procedures.
D-04. Child Protection Policies and Procedures		Must include local child protection policies and procedures that reflect the Program Standards, including immediate reporting of any critical child safety incident, as required in Standard 9.H. The document may be the Agency's Program Manual.
D-05. Continuity of Operations Plan		Must include resources, actions, and procedures for use in the event of a major disruption of operations.

**Standard 5: Finance Procedures**

Each Agency should have a financial procedures manual that is reviewed by the Board Finance Committee or, if no such committee exists, by an appropriate Board committee or by the full Board annually. At a minimum, the manual should encompass the topics in the chart below.

Required Procedure	Items to Include in Procedure
5A. Practice for Maintaining Compliance with GAAP	Note: organization may operate on a cash or modified accrual basis throughout the year, but year-end audited financial statements must be on an accrual basis in alignment with GAAP.
5B. Practices for Separation of Duties for Internal Controls	Must outline how separation/segregation of duties is addressed and indicate mitigating controls where segregation of duties is not available.
5C. Practice for Budget Development and Approval	Must note timing and roles of the budget process, and indicate that the budget should be approved before the start of the fiscal year.
5D. Practice for Monthly Review of Financial Statements	Must include review of month-end financials by management monthly, and by member(s) of governance at least quarterly.  Suggested month-end financials include statement of activities with budget to actual, statement of financial position, and a cash management tool or report.
5E. <i>Optional Processes for Key Finance Functions</i>	<i>May include processes for recording and managing revenues, expenses, cash management, fixed assets, month-end close.</i>

## HUMAN RESOURCES STANDARD 6

### Preamble:

The requirements in this Standard 6 are based on federal employment laws, as well as on best practices that are expected of best-in-class nonprofit organizations such as Big Brothers Big Sisters. Affiliates must ensure that they remain familiar with and are following state and local laws and requirements, developments in federal laws and best practices, and any employment-related provisions required by grants (e.g., a prohibition on distracted driving, seat-belt use, etc.).

### Required Documents:

Standard 6 provides more detail on the required HR documents and there are sample documents available on BBBS Connect. But to summarize, Standard 6 requires the following documents:

- Board-Approved Employee Handbook (Standard 6A)
- Written Diversity and Inclusion Recruitment Plan (Standard 6B-02)
- Job Descriptions (Standard 6B-03)
- On-Boarding Schedule (Standard 6B-05)
- Written Compensation and Benefits Philosophy Statement (Standard 6C-01)

### Standard 6: Human Resources

Each Agency must develop policies and processes, as set forth in this Standard, that support attracting, training, assessing, and retaining Agency staff.

Standard	Required Items
6A. Board-Approved Employee Handbook <a href="#">[Link to example on BBBS Connect]</a>	Each Agency must have a Board-approved Employee Handbook that is reviewed by the Board at least every three years or as the Handbook is revised. The Employee Handbook must include, at a minimum, each of the following policies and procedures, as customized for the Agency:
A-01. Commitment to Diversity & Inclusion Statement	A statement of your Agency's strong commitment to valuing diversity and inclusiveness in your workplace, including with respect to the Agency Board, staff, and volunteers.
A-02. ADA Compliance Policy	This include a reasonable accommodation procedure and interactive process (discussion with the affected employee) if an accommodation is requested.
A-03. Nondiscrimination Policy	A declaration that the Agency will not engage in or tolerate unlawful discrimination on the basis of race, color, religion, national origin, sex, age, pregnancy, or any other federal, state, or local protected class, which may include gender identity or expression, marital status, sexual orientation, veteran status, disability, and/or genetic information. This policy must apply to decisions including recruitment, screening and hiring,

Standard	Required Items
	compensation and administration of benefits, training, development, promotion, termination, and layoff, and all other terms and conditions of employment or Board membership.
A-04. Non-Harassment Policy (including sexual harassment)	A prohibition on harassment, including sexual harassment, examples of harassment, and an explanation of how to report policy violations.
A-05. Policy Prohibiting Retaliation	A policy that prohibits unlawful retaliation against any person who makes a complaint of unlawful discrimination, harassment, or retaliation; raises a work-related concern or complaint of illegal or unethical conduct, or serves as a witness or participates in an investigatory process.
A-06. Safe and Secure Workplace	Provisions that outline Agency procedures for protecting the safety of your workplace.
A-07. Nepotism Policy	Policy that covers 1) whether family members may simultaneously work for the Agency and, if so, whether one family member may supervise another; and 2) whether a family member may serve on the Board while another family member works for the Agency at the same time.
A-08. Social Media & Communications Policy	An internal social media and communication policy that addresses the following: <ul style="list-style-type: none"> <li>i. Policy on the use of Agency electronic communications systems, including computers and other electronic devices, the Internet, and e-mail systems;</li> <li>ii. Handling of confidential information on electronic communications systems;</li> <li>iii. Social networking guidelines</li> </ul>
A-09. Confidentiality Policy	Must address staff responsibilities to maintain confidential Agency, client, donor, employee, volunteer, financial, or business information. Should reference the Data Privacy, Confidentiality, and Security Risk Management Policy (Standard 4D-01).  Must specifically provide that employees are required to maintain confidentiality of such data after their employment ends.
A-10. Criminal Background Screening Policy	An explanation of your background check process for pre- and post-employment checks, including whether you will perform layered checks.
A-11. Record Retention and Destruction Policy	A document retention policy that incorporates the Record Integrity, Retention, and Destruction Governance Policy (Standard 4A-05).

Standard	Required Items
<p>A-12. <i>Optional Sections</i></p>	<p>Must outline an employee’s obligation to maintain documents in accordance with Agency’s document retention schedule.</p> <p><i>You may wish to include some or all of the following provisions in the Employee Handbook, as well as other provisions and policies not listed below, however, these are not required:</i></p> <ul style="list-style-type: none"> <li>• <i>Introduction</i> <ul style="list-style-type: none"> <li>○ <i>BBBS History</i></li> <li>○ <i>BBBS Mission and Vision</i></li> <li>○ <i>Governance structure</i></li> </ul> </li> <li>• <i>Training</i> <ul style="list-style-type: none"> <li>○ <i>The Learning Exchange</i></li> </ul> </li> <li>• <i>Job Performance and Reviews</i></li> <li>• <i>Workplace Attendance and Hours</i></li> <li>• <i>Remote Work</i></li> <li>• <i>Time Off</i></li> <li>• <i>Leaves of Absence</i></li> <li>• <i>Pay</i></li> <li>• <i>Benefits &amp; Insurance (if applicable to your Agency)</i></li> <li>• <i>Frequently Used Acronyms</i></li> <li>• <i>Handbook/policy attestation section</i></li> </ul>
<b>6B. RECRUITMENT AND HIRING STANDARDS</b>	
<p>B-01. Personnel Records and I-9 form</p>	<p>Agencies must maintain all employee personnel files in a confidential, secured location, including the following:</p> <ol style="list-style-type: none"> <li>i. Personnel files include all pre- and post-employment related paperwork and information. This paperwork must be maintained in accordance with all applicable federal, state, and local laws.</li> <li>ii. I-9 Forms must be maintained in accordance with all federal, state and local laws, kept separate and secure from personnel files, and the information therein kept confidential. <ol style="list-style-type: none"> <li>a. Agencies must abide by retention and destruction rules specific to I-9 forms.</li> </ol> </li> <li>iii. Employee medical information (including records related to FMLA, ADA, HIPAA requests, etc.) must be maintained separate from the personnel file and the I-9 forms.</li> </ol>

Standard	Required Items
B-02. Diversity and Inclusion Recruitment Plan	<p>A written plan to address and document your recruitment strategy and outreach process to ensure that, wherever possible, you are reaching and hiring qualified, diverse candidates, including for the CEO/ED and Board members.</p> <p><a href="#">[Link to example on BBBS Connect]</a></p>
B-03. Job Descriptions	<p>Job descriptions that clearly state employee duties, qualifications, essential job functions, physical requirements, competencies and Fair Labor Standards Act (“FLSA”) status and include the following requirements:</p> <ul style="list-style-type: none"> <li>i. As set forth in Standard 2.D.1.a, the CEO/ED must have, at least, a bachelor’s degree from an accredited college or university (unless the requirements of Standard 2.D.1.a.i are met).</li> <li>ii. Staff members who are taking on roles in enrollment/matching and/or match support (“Professional Program Agency Staff”) must have a documented bachelor’s degree, from an accredited college or university, in a field that is determined by the Agency to be appropriate for the position(s).</li> <li>iii. If a candidate for a Professional Program Agency Staff position does not meet the requirement in Standard 6B-03.ii, an Agency is permitted to submit a request to BBBSA for a conditional waiver of the requirement only if the candidate meets one of the following criteria set by the Nationwide Leadership Council: <ul style="list-style-type: none"> <li>a. <i>If the Candidate has an Associate’s Degree:</i> Candidate must also have a minimum of 4 years of relevant work experience in related fields such as social work, counseling, social services, or child development.</li> <li>b. <i>If the Candidate has no higher education degree at all:</i> Candidate must have a minimum of 8 years of relevant work experience as defined above.</li> <li>c. <i>If the Candidate is in the process of completing his/her bachelor’s degree:</i> Candidate must be within 6 months of degree completion.</li> </ul> </li> </ul>
B-04. Background Checks	<p>A criminal history record check is required of all Agency staff and Board members. The policy should include at minimum:</p> <ul style="list-style-type: none"> <li>i. All applicable federal, state and local laws regulating the use of criminal history records should be followed.</li> </ul>

Standard	Required Items
	<ul style="list-style-type: none"> <li>ii. Agencies must assess whether a layered check is necessary for Board members and Agency staff.</li> <li>iii. The background check will be repeated at least every three years during the staff or Board member’s tenure.</li> <li>iv. Agency staff and Board members will be disqualified for:               <ul style="list-style-type: none"> <li>a. Failure to complete the application and screening process;</li> <li>b. History of sexual abuse of children;</li> <li>c. Conviction for any crime in which children were involved;</li> <li>d. History of any sexually exploitive behavior;</li> <li>e. Termination from a paid or volunteer position caused by misconduct with a child;</li> <li>f. Conviction of a crime involving fraud or financial misconduct.</li> </ul> </li> </ul>
B-05. Onboarding Schedule	<p>All Agency staff must have a written employee onboarding schedule that must be maintained in the employee personnel file and that must include at a minimum:</p> <ul style="list-style-type: none"> <li>i. Overview of employee handbook</li> <li>ii. Training schedule</li> <li>iii. Local Agency policies and procedures upon hire.</li> </ul> <p><a href="#">[Link to example on BBBS Connect]</a></p>
<b>6C. COMPENSATION AND BENEFITS STANDARDS</b>	
C-01. A Written Compensation and Benefits Philosophy Statement	<p>This commitment statement summarizes the way your Agency compensates staff monetarily and through Agency benefits.</p> <p><a href="#">[Link to example on BBBS Connect]</a></p>
C-02. Competitive Salary Ranges	<p>Competitive salary ranges for all paid Agency staff. Ranges should be based on regional/ local and industry ranges for compensation and benefits of comparable positions.</p> <p>It is best practice that, at least every three years, the CEO/ED review salary data for all other Agency staff in comparison to the regional/local market.</p>
C-03. Salary Information for CEOs/EDs and Key Employees (Form 990)	<ul style="list-style-type: none"> <li>i. Annually, pursuant to IRS Form 990 Section B-15, Agencies must compile and review salary data from similar nonprofits in its service area for the CEO/ED and any other officers or key employees of the Agency.               <ul style="list-style-type: none"> <li>a. CEO/ED: The Board must conduct an annual review and approval of CEO/ED salary. To</li> </ul> </li> </ul>

Standard	Required Items
	<p>satisfy the Form 990 requirements, this must include a review of the market salary data, consideration by the Board, and a vote by the Board that is captured in the Board minutes.</p> <p>b. Key Employees: The Board must conduct an annual review of key employees' compensation and review of market data, although the CEO/ED, rather than the Board, may approve that compensation.</p>
<b>6D. PERFORMANCE MANAGEMENT AND TRAINING</b>	
D-01. Performance Reviews	<p>All paid Agency staff must have an annual, written evaluation of their performance that includes one or more of the following metrics: goals, objectives, and/or core competencies.</p> <p><a href="#">[Link to example on BBBS Connect]</a></p>
D-02. Staff Training	<ol style="list-style-type: none"> <li>i. All training must be documented electronically or documented with hard copies of training completion materials in the personnel file.</li> <li>ii. All Agency staff, both paid and unpaid, including interns, must successfully complete any required, assigned training including, but not limited to: <ol style="list-style-type: none"> <li>a. The BBBSA online cultural competency training, or a course with the same objectives, within 30 days of hire or placement with the Agency; and</li> <li>b. The BBBS Child Safety and Youth Protection on-line training within 30 days of hire or prior to carrying out work that requires independent professional decision-making (such as interviewing or conducting match support) in service delivery, whichever date is earliest.</li> </ol> </li> <li>iii. All program staff must complete annual youth protection training. Approved youth protection trainings will be available on the Learning Management System and agencies can refer to the BBBSA Agencies Only Website for recommended resources outside of BBBSA.</li> <li>iv. Agency staff responsible for managing the program function and/or supervising program staff must complete BBBS' Program Manager Certification on-line courses within 1 year of hire.</li> <li>v. Agencies must have documentation that all Board members, Advisory Council Members, and non-program</li> </ol>



## Big Brothers Big Sisters Standards of Practice for Independent Agencies

Standard	Required Items
	BBBS Program Staff coming into meaningful contact with children, have been provided information on child safety and youth protection.

## PROGRAM STANDARDS 7-23

### Preamble

For purposes of these Program Standards 7-23, a match is defined as a One-to-One mentoring relationship between a youth and an older mentor, through which the matched parties spend consistent, significant time together, and which is monitored and supported by Professional Program Affiliate Staff (as defined in Standard 6B-03).

A match may be carried out in different settings, which include:

- Community-Based (“CB”), where matches meet in the community;
- Site-Based (“SB”), where matches only meet at a designated site (*e.g.*, school, workplace, or other site);
- Site-Based Facilitated (“SBF”), where matches only meet at a designated site (*e.g.*, school, workplace or other site) and a staff member is present at all sessions and observing match interactions; and
- Site-Based Plus (“SB+”), a hybrid where matches meet both in CB and SB settings. Any match that will be permitted to meet outside of a designated site must follow the volunteer and youth/family enrollment, training, matching and match support procedures of a CB match, even if the primary meeting location will be the designated site.

### **Standard 7: Innovation**

BBBSA values learning and innovation. Innovation, with careful consideration of associated risks, is critical to deepening the outcomes we seek for children. To allow our work to evolve, and to ensure we are striving to improve, it is important to provide a balance of structure and freedom for Agency innovation.

Agencies that propose to innovate outside of the Program Standards may be permitted to enter into a pilot program with BBBSA. Pilot programs must be developed so that specific data can be collected to evaluate innovative approaches and to ensure positive outcomes for children as well as child safety. A Standards Committee of the Nationwide Leadership Council will review each pilot program request for possible approval and will evaluate the data from approved pilot programs.

In a pilot program, temporary relief from one or more standards may be given to an Agency pursuant to the following approval process:

- Phase 1: Research & Design
- Phase 2: Application and Approval Process
- Phase 3: Conduct Pilot
- Phase 4: Report Outcomes

**Standard 8: Quality Assurance**

Quality Assurance reviews will be a thorough review of all program functions, including, but not limited to, Enrollment and Match Support and should review the work of all Program Staff. Staff must receive feedback on the quality of their work. The Agency must have procedures for addressing Agency Staff work that does not meet quality standards.

**Standard 9: Child Safety and Youth Protection Policies**

The Agency's Program Manual and Risk Management Plan contain written, Board approved policies and procedures which address, at a minimum:

A. Policy on Obtaining Criminal History Record Check. A criminal history record check is required of all:

- Volunteer Bigs,
- Board Members,
- Agency Staff, and
- Non-mentoring volunteers who come into meaningful contact with children.

1. Volunteer Bigs:

- a. At time of initial enrollment: *See Standard 16*
- b. While an active Big: Updated, layered criminal history check at least every 3 years.
- c. At time of reassessment: *See Standard 22*

2. Adherence to all applicable federal, state and local laws regulating the use of criminal history records; and that

3. Potential Volunteer Bigs and volunteers who have been accepted as Volunteer Bigs, will be disqualified for:

- a. Failure to complete the application and screening process;
- b. Past history of sexual abuse of children;
- c. Conviction for any crime in which children were involved;
- d. History of any sexually exploitive behavior; and
- e. Termination from a paid or volunteer position caused by misconduct with a child.

B. Policy on Transporting Children. The policy must include, at a minimum:

1. Agency Staff document in the volunteer's file verification of appropriate licensure and insurance held by the volunteer if they will be transporting the child;
2. Documentation of verification of appropriate licensure and insurance held by Agency Staff if they will be transporting children; and
3. Safety requirements in accordance with state law (e.g. seat belt use, car seat use, prohibitions on use of cell phone, alcohol or other drugs prior to driving a child).

- C. Policy on Mandatory Training on Child Safety and Youth Protection for Volunteer Bigs, Parent/Guardians, Children, and all BBBS Agency Staff and Board Members. The policy must include, at a minimum:
1. All Agency Staff, both paid and unpaid, including interns, must successfully complete the BBBS Child Safety and Youth Protection on-line training within 30 days of hire or prior to carrying out work that requires independent professional decision-making in service delivery, such as interviewing or conducting match support;
  2. Volunteer Bigs, parent/guardians, children must receive child safety and youth protection training prior to matching, which must be documented to the file; and
  3. Documentation that all non-mentoring volunteers, including Board members, and non-program BBBS Agency Staff coming into meaningful contact with children, have been provided information on child safety and youth protection.
- D. Policy on Children Visiting Volunteer Applicants' Home. The policy must address, at a minimum:
1. Promotion of healthy relationship development, especially early in the match relationship;
  2. Procedures to monitor safety levels of activities that take place in the Volunteer Bigs home; and
  3. Reinforcement of the children's personal safety education provided to children, parents and volunteers at enrollment/orientation.
- E. Policy on Overnight Visits. If overnight visits with children and Volunteer Bigs are permitted, the policy establishes written guidelines including, at a minimum:
1. A waiting period before overnight visits can occur;
  2. Requirements for accommodations that allow for privacy for sleeping and changing clothes; and
  3. Procedures for Agency Staff monitoring of safety levels and frequency of overnight visits.
- F. Policy on Firearms and Weapons. The policy must include, at a minimum:
1. Requirements that any firearms and/or weapons ownership by the Volunteer Big applicant be:
    - a. Disclosed to BBBS's Agency Staff at enrollment and throughout the life of the match;
    - b. Disclosed to the child's parent/guardian by Agency Staff; and
    - c. The Volunteer Big must attest to the fact that any weapons, firearms or ammunition ownership are licensed, permitted, registered, and handled in

accordance with all applicable state and federal laws.

- i. Guidelines which will be reviewed with and agreed to by the Volunteer Big and parent/guardian, and documented in the match file covering, at a minimum:
2. Weapons, firearms and ammunition will be made inaccessible at all times to a child while in the Volunteer Bigs care, unless participating in specific, approved activity(ies), which the parent/guardian and Volunteer Big have approved in advance and such approval is documented in the match file (e.g., hunter safety courses).

G. Policy on Digital Technology and Social Networking. The policy must address, at a minimum:

1. Confidentiality
2. Privacy
3. Child safety

H. Policy on Mandatory Child Abuse and Exploitation Reporting. The policy must include, at a minimum:

1. Within 24 hours of initial notification, BBBS agencies are required to report to BBBSA, AND to law enforcement or child protection authorities any reported or suspected incident, allegation, investigation or civil proceeding that may constitute abuse or exploitation committed against a child under 18 or a vulnerable adult as defined by State or Federal Law, whether or not they are reported by third parties or anonymous sources, where the misconduct of the following individuals is involved:
  - a. Current or Former Volunteer Big,
  - b. Current or Former Board Member,
  - c. Current or Former Staff Person, or
  - d. Current or Former Other adult associated with Big Brothers Big Sisters (other than the Parent/Guardian)
2. Mandatory critical incident reporting to BBBSA includes information obtained from third parties or anonymous sources. Required reports include the following, at a minimum:
  - a. Sexual misconduct against a child or in the presence of a child that may include contact or non-contact behaviors of a criminal nature;
  - b. Physical violence against a child or in the presence of a child;
  - c. Behavior that causes significant emotional or psychological harm to a child;
  - d. Neglect of a child;
  - e. Any other incident the agency deems critical

3. All employees, volunteers and board members of a BBBSA agency are required to report any suspected or reported incident of child abuse or exploitation. Agencies must have a policy regarding the reporting obligations of Volunteer Bigs, Board Members, Staff and non-mentoring volunteers addressing their local protocols for mandatory reporting of all suspected child abuse, neglect or exploitation (for example: suspected abuse of a Little or other child where the alleged abuser may be a family member, friend, stranger, etc.). **Reports of this nature are not required to be reported to BBBSA.**
- I. Policy on Board Members and Staff Serving as Volunteer Bigs. The policy must include, at a minimum:
  1. Whether current Board members and Agency Staff are allowed to serve as Volunteer Bigs, and if allowed, establishes procedures to provide for Agency Staff to remain objective in decision-making, in the best interests of the child served.
- J. Policy on Use of Alcohol, Tobacco Products, and Illicit and Legal Drugs or Substances. The policy must include, at a minimum:
  1. A prohibition on matched Volunteer Bigs being under the influence or using any substance (including alcohol, illicit drugs, and legal drugs, including medical marijuana, “legalized” marijuana, and prescription medications) that could potentially affect judgment, driving, reaction time, or otherwise jeopardize a child’s safety and wellbeing, while their Little is in the Volunteer Big’s care or company.

**Standard 10: Federation-wide Information Management System**

Agencies must use the BBBS Federation-wide information management system for all program functions.

**Standard 11: Outcomes System**

Agencies must use the Big Brothers Big Sisters Outcomes System, which currently includes collection, reporting, and analysis of data on the length, strength, and quality of matches; individual child outcomes; and the survey tools Strength of Relationship (SoR), Youth Outcomes Survey (YOS), and the new Child Outcomes Survey (COS) when made available.

**Standard 12: Program Manual**

Each Agency must have a written Program Manual available to all Agency Staff and annually reviewed by Agency Staff, containing the policies and procedures to be used for implementing all One-To-One services. The Program Manual must contain written procedures that address the following critical functions in the Service Delivery process, at a minimum:

- A. Eligibility: Written eligibility criteria for Volunteer Bigs, children, and parent/guardians that addresses the expectations of all parties and the ability of the child to form a relationship;
- B. Inquiry and Orientation;
- C. Enrollment of Volunteer Bigs and children;
- D. Pre-match Training;
- E. Pre-matching and Matching;
- F. Youth Outcomes Development Plan;
- G. Match Supervision and Support;
- H. Match Closure;
- I. Reassessment and Rematch;
- J. Agency Staff training;
- K. Document retention and confidentiality;
- L. Agency Information Management System;
- M. Big Brothers Big Sisters Outcomes System; and
- N. Quality Assurance

**Standard 13: Non-Discrimination**

- A. Children are not excluded on the basis of race, religion, national origin, color, gender, sexual orientation, disability, gender identity, parent's veteran status, or marital status of parent.
- B. Volunteer Big Brothers, Big Sisters, Board Members, and Agency Staff as Volunteer Bigs are not excluded on the basis of race, religion, national origin, color, gender, marital status, sexual orientation, gender identity, veteran status, or disability.

**Standard 14: Inquiry, Recruitment, and Orientation**

**Volunteer**

- Description of BBBS/Agency’s mission, programs, benefits, and purpose of program (why we do the work we do).
- Demographics of the children served.
- Eligibility criteria and commitment expectations
- Review enrollment process steps, including the Agency’s right to accept or deny participants, or close a match at any time.

**Parent/Guardian**

- Description of BBBS/Agency mission, programs, benefits, and purpose of program (why we do the work we do).
- Child eligibility criteria and commitment expectations, emphasizing the importance of parental involvement.
- Review enrollment process steps, including Agency’s right to accept or deny participants, or close a match at any time.
- School / Site-Based Mentoring (SBM) ONLY: send to the home the application / permission forms, along with child safety prevention materials and enough program information for parent/guardian(s) to make an informed decision.

**Standard 15: Child Enrollment**

**Child Enrollment Process**

Child meets the Agency’s written eligibility requirements

Signed application from parent/guardian giving written consent; including appropriate releases (e.g. media, confidentiality)

Conduct an in-person interview with child

Interview with parent (not required for School/Site-based matches; however, the parent/guardian and school must be given the opportunity to provide information about the social, educational, behavioral, and developmental strengths and needs of the child

Conduct an assessment of home environment - a documented professional evaluation that can be done through a series of targeted questions relative to the physical surrounding and immediate neighborhood, and the residents of the home. For School/Site-based: The parent/guardian and school will be given the opportunity to provide information

Request collateral Information as needed (therapy report, school report, etc.)



Written professional assessment and matching recommendations based on a holistic assessment of information gathered during the inquiry and enrollment process.
Reassessment: Ready-to-be-Matched (RTBM) children must be reassessed every twelve months if they have been waitlisted and not matched. All information about the child, the family, and the home environment should be updated (a home visit is optional).

**Standard 16: Volunteer Enrollment**

The Volunteer Big enrollment process is a comprehensive process to determine eligibility, suitability and matchability of the Volunteer Big applicant. The process gathers the necessary information needed to enable the Agency Staff to prepare recommendations for matching based upon the Volunteer Big applicant’s ability to help meet the needs of a child and form a committed relationship with the child, and to work with the parent/guardian (except in School / Site-based programs), and the Agency.

<b>Volunteer Big Enrollment Process</b>	<b>Community-Based / Site-Based Plus</b>	<b>School/ Site-Based</b>
Volunteer Big applicant meets the Agency’s written eligibility requirements	<b>Required</b>	<b>Required</b>
Application with electronic or written consent	<b>Required</b>	<b>Required:</b> Parental Permission for High School Volunteer Bigs
<p><b><u>ALL</u></b> references must be obtained by Agency Staff trained in obtaining references and in Child Safety/Youth Protection.</p> <p>References may be completed by mail, email, phone, or in person.</p>	<p><b>Required</b></p> <p>One positive reference from the Volunteer Big applicant’s Spouse/Spousal equivalent or Family Member, if no Spouse/Spousal equivalent is available. Reference must assess child safety in the applicant’s home and assess the applicant’s qualifications and appropriateness to serve a Big.</p> <p>Two positive references from work, school, or a personal reference.</p> <p>If applicant has disclosed</p>	<p><b>Required</b></p> <p>One positive reference from Volunteer Big applicant’s Spouse/Spousal equivalent or Family Member, if no Spouse/Spousal equivalent is available. Reference must assess the applicant’s qualifications and appropriateness to serve as a Big.</p> <p>One positive reference from work, school, or a personal reference.</p> <p>If applicant has disclosed relevant volunteer or paid experience with youth within last 5 years, reference(s) are required from each</p>

Volunteer Big Enrollment Process	Community-Based / Site-Based Plus	School/ Site-Based
	<p>relevant volunteer or paid experience with youth within the last 5 years, reference(s) are required from each youth serving organization(s) where the applicant had such experience. If a youth serving organization(s) is not responsive, all attempts to obtain each reference or references must be made and documented.</p> <p>If a <u>negative</u> reference is obtained, staff must consult with a supervisor. In addition, where there is a negative reference, the decision on the applicant and accompanying justification must be documented in the file. If the applicant is approved, an additional positive reference must be obtained.</p> <p>If a neutral reference is obtained (<i>i.e.</i>, a reference that only gives factual information about dates of employment/service, but no other information), staff must obtain an additional positive reference.</p>	<p>youth serving organization(s) where the applicant had such experience. If a youth serving organization(s) is not responsive, all attempts to obtain each reference or references must be made and documented.</p> <p>If a <u>negative</u> reference is obtained, staff must consult with a supervisor. In addition, where there is a negative reference, the decision on the applicant and accompanying justification must be documented in the file. If the applicant is approved, an additional positive reference must be obtained.</p> <p>If a neutral reference is obtained (<i>i.e.</i>, a reference that only gives factual information about dates of employment/service, but no other information), staff must obtain an additional positive reference.</p>
<p>Conduct background checks, including criminal history record checks.</p>	<p><b>Required</b> Confirmation of person's identity by</p> <ul style="list-style-type: none"> <li>• fingerprint or</li> <li>• government issued photo</li> </ul>	<p><b>Required</b> Confirmation of person's identity by</p> <ul style="list-style-type: none"> <li>• fingerprint or</li> <li>• government issued photo ID or</li> <li>• social security verification or</li> </ul>

Volunteer Big Enrollment Process	Community-Based / Site-Based Plus	School/ Site-Based
	ID or <ul style="list-style-type: none"> <li>social security verification</li> <li>DMV Check</li> </ul> Criminal history record checks that are layered at the local, state, and national levels. If applicable, conduct international, juvenile records, and/or military service checks.	<ul style="list-style-type: none"> <li>School ID (HS Students)</li> </ul> Criminal history record checks that are layered at the local, state, and national levels. If applicable, conduct international, juvenile records, and/or military service checks.
In-person Interview	<b>Required</b>	<b>Required</b>
Assessment of home environment <sup>1</sup>	<b>Required</b> Optional: home visit	<b>Required</b>
Request collateral Information as needed (e.g., therapist, counselor)	<b>Required</b>	<b>Required</b>
Written professional assessment and matching recommendation based on a holistic assessment of information gathered during the inquiry and enrollment process.	<b>Required</b>	<b>Required</b>

**Standard 17: Pre-Match Training**

Training must be conducted prior to the actual match and provide participants (Volunteer Big, child, and parent/guardian) the information needed to begin a match, develop, and sustain effective and enduring match relationships.

- A. Pre-match training must be interactive, evaluated, documented and can be provided in-person, online with interaction, and/or individually, in group sessions, or a combination thereof (in writing for School/Site-Based parent/guardians). Training should be conducted by an Agency Staff member who demonstrates a strong competency for training others.

---

<sup>1</sup> Definition of Home Assessment: A documented professional evaluation that can be done through a series of targeted questions relative to the physical surrounding and immediate neighborhood, and the residents of the home.

B. Pre-match training must cover, at a minimum:

<b>VOLUNTEER</b>	<ul style="list-style-type: none"> <li>• Ground rules / Program rules</li> <li>• Volunteer Big obligations and appropriate roles</li> <li>• Expectations for the match relationship; relationship development cycles</li> <li>• What is match support and why we do it</li> <li>• Child Safety/Youth Protection</li> <li>• Ages and stages of child development</li> <li>• The match closure process</li> </ul>
<b>PARENT/ GUARDIAN</b>	<ul style="list-style-type: none"> <li>• Ground rules / Program rules</li> <li>• Expectations for the match relationship; relationship development cycles</li> <li>• What a Volunteer Big is and isn't</li> <li>• Expectations for parent partnership (why you are important to this experience)</li> <li>• What is match support and why we do it</li> <li>• Child Safety/Youth Protection</li> <li>• The match closure process</li> </ul> <p><i>* For School/Site-Based parents this information may be sent electronically or through the mail.</i></p>
<b>CHILD(REN)</b>	<ul style="list-style-type: none"> <li>• What is a Big Brothers/Big Sister</li> <li>• Ground rules/Program rules</li> <li>• Expectations for the match relationship</li> <li>• What is match support and why we do it</li> <li>• Personal safety</li> <li>• The match closure process</li> </ul>

**Standard 18: Pre-Matching and Matching Process**

- A. Agency Staff will assess all information gathered through inquiry and enrollment, applications, references, and interviews of all parties, including taking into consideration parental, Volunteer Big and child preferences, in order to make a thoughtful match selection, with a documented match selection rationale.
- B. The Pre-Match Presentation must be interactive, done in-person or by phone, and must ensure that each party understands the Agency's matching rationale (including the needs of the child, and what the Volunteer Big brings to the match), resulting in all parties approving the match. Agency staff will act in accordance with the Agency's policy on confidentiality.

Agency staff will document match selection rationale, reaction to parties (denials and acceptances) and all approval dates. For Technology Enhanced Mentoring (TEM) programs, the presentation may be done via email or via the Technology Enhanced Mentoring secure platform.

- C. The Volunteer Big must approve the match before the match introduction meeting for both Community-based and Site-based matches. For TEM programs, the volunteer must be given the opportunity to voice concerns via email or the TEM secure platform in regard to the potential Child being proposed as a match.
- D. The Parent/Guardian must approve the match before the match introduction meeting for Community-based matches.
- E. The Match Introduction Meeting must be in-person and conducted by Agency Staff in order to properly introduce all match parties and review critical information that will build the longest, strongest, safest match possible. For TEM programs, the Match Introduction will occur through a structured email prompt delivered by staff that guides the Big and Little to introduce themselves to each other. Staff must also review the first email exchange between Big and Little to ensure that appropriate introductions took place. Involvement of the parent/guardian is mandatory for Community-Based and Site-Based Plus matches. Written documentation of completed match introductions for all programs must include, at minimum:
  - 1. A signed match agreement form containing ground rules/program rules that outline roles, responsibilities, and expectations for each match participant; and
  - 2. A post-match meeting assessment by Agency Staff, reviewing overall reaction by participants to the match meeting and identifying areas for future match support.

**Standard 19: The Youth Outcomes Development Plan**

The Youth Outcomes Development Plan (YODP) describes the outcomes desired for the child as a result of the match. Agency staff will develop a YODP at the start of the match. Staff use the YODP in match support to encourage and coach the match towards desired outcomes. Staff must review the plan annually with match participants to assess progress made and make any necessary adjustments.

**Standard 20: Match Support and Match Supervisory Schedule**

The Agency Staff ensures regular, ongoing contact with each match by conducting private, one-to-one, interactive, match support contacts. The intent of Match Support is to monitor, coach, and guide the match in order to promote the development of the match relationship, match longevity, child safety, and positive youth development.



- A. All match support contacts must be documented by Agency staff.
- B. Match support contacts must regularly assess:
  - 1. Child Safety
  - 2. Relationship Development, including activities and communication between the match participants
  - 3. Youth Development
  - 4. Agency Engagement
  - 5. Additional Needs or Concerns
- C. Match contacts may be in person, over the phone, or via written or electronic means (email/text/social media) provided a contact involves substantive, two-way communication directly with the match parties and an opportunity for the staff and match parties to engage in follow up questions or discussions.
  - 1. An attempted contact, leaving a message or voice mail, or sending a contact request via electronic means does not count as a contact.
  - 2. In-person contacts can satisfy two months of contacts within the first year of the match (for both CB and SB matches).
  - 3. In TEM programs, match support will also include the added safeguard of email review. Agency staff will review at least two email exchanges per month between each match. Staff documentation must indicate an understanding of the strengths and challenges of each match, as informed by a combination of match support contacts and review of email exchanges. If full understanding of match dynamics cannot be understood by reviewing two email exchanges per month, staff will review additional email exchanges. Agencies will also monitor the TEM secure platform to identify potentially inappropriate discussions.
- D. Required Contact Schedule:

<b>Community-Based/Site-Based Plus</b>			
	<b>Parent/Guardian</b>	<b>Child</b>	<b>Volunteer Big</b>
<b>Within First Two Weeks</b>	Required	Required	Required
<b>During First Year</b>	Monthly, may alternate with child	Monthly, may alternate with parent/guardian	Monthly
<b>Greater than One Year</b>	Every 3 months	Every 3 months	Every 3 months

<b>Site-Based</b>			
	<b>Parent/Guardian</b>	<b>Child</b>	<b>Volunteer Big</b>
<b>Within First Two Weeks</b>	Required communication notifying of the match relationship and agency ground rules (written, phone, or in person).	Required	Required
<b>During First Year</b>	Communication twice a year (written, phone, or in person)	Every month during school year + at least 1 summer communication	Every month during school year + at least 1 summer communication
<b>Greater than One Year</b>	Communication twice a year (written, phone or in person)	Every 3 months during school year + at least 1 summer communication	Every 3 months during school year + at least 1 summer communication
<b>Site-Based Facilitated</b>			
	<b>Parent/Guardian</b>	<b>Child</b>	<b>Volunteer Big</b>
<b>Within First Two Weeks</b>	Required communication notifying of the match relationship and agency ground rules (written, phone or in person).	Required	Required
<b>During First Year</b>	Communication twice a year (written, phone, or in person)	Every 2 months during school year + at least 1 summer communication	Every 2 months during school year + at least 1 summer communication
<b>Greater than One Year</b>	Communication twice a year (written, phone, or in person)	Every 3 months during school year + at least 1 summer communication	Every 3 months during school year + at least 1 summer communication

**Standard 21: Match Closure**

The match closure process must include, at a minimum:

- A. The match support record must show that reasonable attempts were made by Agency Staff to contact the parent/guardian, child, and the Volunteer Big, individually, to thoroughly explore the reasons for closure, safety levels, level of satisfaction, and youth outcomes associated with the match.
- B. When no child safety issues are present and parties are available and agree, every effort will be made and documented to have a facilitated final communication or visit with the Volunteer Big and with the child (preferably in-person) that provides for:
  1. An explanation for the reason(s) for match closure (as appropriate);

2. An opportunity to reduce any adverse effects from the match closure for the child; and
  3. An assessment of the accomplishments of the match in delivering positive outcomes.
- C. The Agency Staff who had oversight of the match must provide a written assessment and recommendations of the appropriateness for rematch and re-engagement of the parent/guardian, child and/or Volunteer Big, either as a Volunteer Big, Little, donor, Board member or other volunteer, based on their successful past service; any need for additional support or training in future match consideration; and to determine further involvement and on-going communication with the Agency.
- D. Written notification of match closure to all parties, including, when necessary, clarification of the risks assumed by match parties in continuing a relationship outside of the Agency’s supervision.

**Standard 22: Reassessment for Re-Match**

If any volunteer is re-enrolling as a volunteer Big, Agency staff must take a purposeful, fresh look at the individual requesting to be matched to determine the eligibility and suitability of the volunteer for a safe, effective match. This process must include a comprehensive review and assessment of the Agency’s prior experience with the Volunteer Big, including, at a minimum, the following components:

- initial enrollment information (assessment, background check);
- experience, motivation, training & support needs;
- adherence to BBBS’ safety guidelines;
- reasons for previous match/file closures; and
- meaningful life changes that have occurred since the volunteer’s initial enrollment (for example: divorce, significant loss, unemployment, etc.).

Based on the review and assessment, staff must determine whether additional collateral information is required. Additionally, based on the timeline below, staff must comply with the following steps from the Volunteer Enrollment Process:

	<b>Less than 1 Year from Closure<sup>2</sup></b>	<b>More than 1 Year from Closure</b>
<b>Updated Volunteer Interview</b>	Via phone or in person	In person or through face-to-face video interviewing via Skype,

<sup>2</sup> “Closure” refers to both file closure and match closure.

	Less than 1 Year from Closure <sup>2</sup>	More than 1 Year from Closure
		FaceTime, or the equivalent
<b>Updated Background Check</b>	<ul style="list-style-type: none"> <li>• If background check was run more than 3 years ago, a full background check is required.</li> <li>• If a background check was run less than 3 years ago, then only one layer of background check is required.</li> </ul>	A layered background check is required
<b>References</b>	<p>Obtain updated in-depth reference from:</p> <ul style="list-style-type: none"> <li>• Any new spouse/spousal equivalent;</li> <li>• All youth serving organization(s) through which the volunteer did any new, relevant volunteer or paid experience with youth within the last 5 years. If a youth serving organization(s) is not responsive, all attempts to obtain each reference or references must be made and documented.</li> </ul> <p>Additional references may be warranted based on agency assessment.</p>	<p>Obtain updated in-depth reference from:</p> <ul style="list-style-type: none"> <li>• Any new spouse/spousal equivalent;</li> <li>• All youth serving organization(s) through which the volunteer did any new, relevant volunteer or paid experience with youth within the last 5 years. If a youth serving organization(s) is not responsive, all attempts to obtain each reference or references must be made and documented.</li> </ul> <p>Additional references may be warranted based on agency assessment.</p>
<b>Completion of Updated/Current Agency Forms &amp; Orientation to Any New Agency Policies or Procedures, Incl. Ground Rules.</b>	Required	Required
<b>Training, Per the Recommendations Made in the Match Closure Interview (or for New Assessments, from the Assessment Interview).</b>	Required	Required



**Standard 23: Program Staff Training**

- A. All program staff must complete annual youth protection training. Approved youth protection trainings will be available on the Learning Management System and agencies can refer to the BBBSA Agencies Only Website for recommended resources outside of BBBSA.
- B. Agency staff responsible for managing the program function and/or supervising program staff must complete BBBS' Program Manager Certification on-line courses within 1 year of hire.