

How to Build
A Successful Mentoring Program
Using the
Elements of Effective Practice[™]



A STEP-BY-STEP TOOL KIT FOR PROGRAM MANAGERS

Don't Forget the Free Tools!

Please note that this PDF does *not* include all of the tools available on the CD-ROM. You can review and download the tools you want directly from the web site:

Tools for Designing and Planning

http://www.mentoring.org/find_resources/tool_kit/design/

Tools to Manage a Program for Success

http://www.mentoring.org/find_resources/tool_kit/management/

Tools to Structure Effective Program Operations

http://www.mentoring.org/find_resources/tool_kit/operations/

Tools to Establish Evaluation Criteria and Methods

http://www.mentoring.org/find_resources/tool_kit/eval/

Section V.

How to Manage a Program for Success

To ensure that your program is well-managed:

- Form an advisory group;
- Develop a comprehensive system for managing program information;
- Design a resource development plan that allows for diversified fundraising;
- Design a system to monitor the program;
- Create a professional staff development plan;
- Advocate for mentoring; and
- Establish a public relations/communications effort.

This section will provide a brief overview of each task, along with the tools to help you accomplish them.

FORM AN ADVISORY GROUP

The decision to have a formal advisory structure, such as a board of directors or a less formal advisory group, will be based on your decision during the program design phase about whether you will be a freestanding program, partner with another organization or be part of a larger organization. In any case, your advisory group will provide vision and leadership for your program.

If you decided to become a 501 (c)(3), you will need a formal board of directors. The board will have legal and fiduciary responsibility for your organization, so the selection of directors is very important and should reflect key areas of expertise you need, including legal, financial, organizational and program management. Many boards also include members who represent the constituency that is being served.

If, on the other hand, your mentoring program is part of a larger, established organization or you will partner with another established organization, a board of directors is already in place. If you already have a board of directors, you can create your advisory structure in a number of ways, such as:

- Add people with interest and experience in mentoring to the board of your organization; and/or
- Create a standing committee within the current board structure with specific responsibilities for your mentoring program.

FUNCTIONS OF AN ADVISORY GROUP

- Clarify the organization's mission or vision;
- Resolve key strategic or policy issues;
- Develop the financial resources needed to support the strategy;
- Provide expertise or access to policymakers;
- Build the reputation of the organization with key stakeholders;
- Oversee financial performance;
- Ensure adequate risk management;
- Assess the organization's performance with regard to its priorities; and
- Improve board performance.

SOURCE: DR. SUSAN G. WEINBERGER, PRESIDENT
MENTOR CONSULTING GROUP INC.

If you will be forming an advisory group that is less formal than a board, you will want to include mentoring experts and stakeholders from your community, as well as program volunteers and representatives, such as family members of the population you will serve.

An informal committee or advisory group provides support and guidance to the program coordinator by providing a sense of community for building the program and helping to expand the mentoring program by promoting it to various networks.



MENTORING TOOL

See advisory group tools in Section V on the CD.

Define the Advisory Group's Roles and Responsibilities

In general, a board of directors will have the following primary areas of responsibility:¹

1. **Setting policy and approving practices** for your mentoring program;
2. **Assuming legal responsibility** for all the affairs of your organization, including incorporation, bylaws, liability and insurance;
3. **Serving as the fiduciary body** for your organization, overseeing accounting, auditing, fundraising, budgeting, investing and financial procedures;
4. **Providing connections to potential funders** and hands-on support to help your program raise funds; and
5. **Providing legal, financial and other expertise as needed.**

An advisory group will do the following:

1. Offer advice on how to design, manage, evaluate and fund your mentoring program;
2. Set and approve program policies and practices; and
3. Provide hands-on operating support.

No matter which model you choose to follow, your advisory group will have one of the most significant tasks in building your program: agreeing on and clearly spelling out, in writing, your program's philosophy, mission, policies and approved practices. This written document should clarify the following areas:

- The population your program intends to serve (e.g., young people from the surrounding neighborhood, students in a particular school);
- How you will identify, recruit and match mentors and young people;
- How often mentors and young people will meet and how long the relationships will last;
- Types of activities mentors and mentees will take part in (e.g., group activities, one-to-one mentoring, e-mentoring);
- Non-mentoring roles (such as fundraising, public relations and special events) available to volunteers, with job descriptions for each;
- Risk management and liability issues;
- The amount of funding you will need and how your program intends to raise it; and
- Financial management policies and practices.

Recruit People with Diverse Backgrounds to Serve on the Group

In seeking individuals to serve on your advisory group, look for people who reflect the diversity of your community and who are committed to your program's mission. In addition, look for individuals who represent the “three Ws” so important to sustaining a program: work, wisdom and/or wealth.² Seek out parents, mentors, youth, community members, proven volunteers, educators, clergy, doctors, foundation representatives, corporate leaders, financial experts and philanthropists. All prospective advisory group members should be willing and able to provide personal financial support to your program at the level most appropriate for them. Their strong commitment is important because prospective funders will ask if your advisory group members support the mentoring program.

Facilitate the Advisory Group Meetings to Improve Programming and Management

Structure your meetings to capitalize on the skills, expertise and resources of your advisory group and to address program needs. If you have a formal board of directors, consult your United Way or other board management resources listed at the end of this section for information on best practices for board management.

DEVELOP A COMPREHENSIVE SYSTEM FOR MANAGING PROGRAM INFORMATION³

Because you'll be working with young people, much of the information you collect and use will be of a very sensitive nature. You'll need to develop a comprehensive system for managing, maintaining and safeguarding all types of data—from information about program finances, personnel records, program activity and mentor/mentee matches to the data you compile on risk and liability and program evaluation outcomes.



MENTORING TOOL

See tools to track program activity in Section V on the CD.

Manage Program Finances

During the program design and planning phase, you should have established a financial plan and budget. Now you need to develop a system for managing your financial information. Whether you are a freestanding nonprofit or part of another nonprofit organization, you must be able to verify to the IRS and any funding organizations all revenue received and expenditures made. As part of that responsibility, you need to keep accurate records of funding sources, including grants, cash and in-kind contributions. You'll also need to record expenditures accurately and develop a system for documenting the actual costs of running your program. In addition to satisfying IRS and funding requirements, accurate records will help you estimate costs for future budgets.

Even if your program is fortunate enough to have all staff, administration, space and equipment donated, you still must document the costs of items such as these:

- Recruitment and training materials (e.g., folders, pens, photocopying);
- Volunteer expenses (e.g., gas, refreshments, tickets);
- Special events (e.g., refreshments, certificates, special awards and prizes);
- Items needed by participants (e.g., bus fare, school supplies);
- Screening mentors (criminal background checks); and
- Extra liability coverage.

You should also establish a system of internal controls to protect against theft or fraud. Each year, have an audit performed by an independent outside auditor.

Maintain Accepted Personnel Practices and Records

It is essential that your personnel policies and practices meet federal, state and funder requirements and that you maintain accurate personnel records for all staff and volunteers. Personnel records should include the following:

- *An I-9 master file.* All employees must complete an I-9 form and provide the proper IDs/documentation showing evidence of authorization to work in the United States. All I-9s must be kept out of the individual's personnel file, to prevent discrimination.
- *Employee personnel file.* Each employee's file should include original copies of his or her resumé, job description, application, W-4 form, signed offer letter, emergency contact information, professional references and so forth.

Follow standard human resources practices on forms and information that must be kept in employees' records, and ensure the confidentiality of all personnel records. Additionally, all health-care-related applications and information must be kept in a separate file to avoid discrimination. For mentors, it is important that programs maintain copies of their application, references, results of their background check, mentor agreement and so on.

Track Program Information and Activity

Other information you should track to manage your program more effectively includes the following:

- Demographic data of mentors and mentees;
- Status of screening process for prospective mentors, mentees and staff;



MENTORING TOOL

See tools for keeping mentor records in Section V on the CD.

- Hours of pre-service training for mentors;
- Hours of ongoing training and support sessions;
- Attendance and participation records for group activities;
- Monthly program coordinator contact with participants;
- Number of volunteer hours or contacts between pairs; and
- Time lapse between various stages of the application process (e.g. average time between a mentor's initial expression of interest and training, or between training and matching).

Document Mentor/Mentee Matches

To succeed, a mentoring program must foster strong mentor/mentee relationships. Good relationships don't just happen, they require ongoing support and supervision from the program coordinator. For details, see Section VI, How to Structure Effective Program Operations. To obtain this knowledge, you should track the following:

- Mentor and mentee application, intake or preference forms;
- Status of the matching process;
- Program caseload and waitlist;
- Frequency, type and quality of mentor/mentee contact; and
- Duration of relationships.



MENTORING TOOL

See tools to track program activity in Section V on the CD.

Manage Risk

A risk-management system is vital to the safety and sustainability of your program. You must establish clear risk-management policies and procedures and maintain detailed and accurate records. Keep all results from your volunteer and staff screening process (background checks, references and interview notes) in a secure location. Create clear guidelines to document unusual incidents and any follow-up action taken.

Document Program Evaluation Efforts

To ensure the quality and effectiveness of your program, periodically evaluate your program processes and outcomes. Be sure to maintain copies of your evaluation tools, results and the overall analysis. For more information, see Section VII, How to Establish Evaluation Criteria and Methods.

DESIGN A RESOURCE DEVELOPMENT PLAN THAT ALLOWS FOR DIVERSIFIED FUNDRAISING

Running an effective mentoring program costs money. During the program design and planning phase, you should have determined what kind of program you wanted to develop. If you have not developed your program model, stop and do it now. Without clear goals and a program mission, you may be tempted to “follow the money” and change your program goals to suit a particular funding source. The result will be a program that lacks vision and clarity and is ineffective in serving its target audience. Once you have developed a concrete program model, you can create a program budget and determine the amount of funding you need to start and sustain your program. Next you’ll need a plan for raising that funding.

In developing your fundraising plan, avoid one of the most common mistakes: relying too heavily on one funding source. In fact, some experts say if 30 percent of your program funding comes from one source, you should consider yourself in a crisis. Instead, plan to tap into a variety of funding streams:

MENTORING TOOL

See tools to manage risk in the appendix of Section VI and on the CD.

- Seek in-kind gifts;
- Hold special events;
- Solicit individual donors;
- Seek corporate donations;
- Apply for government funding (local, state and federal); and
- Seek foundation grants.

Tips for Seeking Funds⁴

Research a variety of funding prospects. The following are some potentially good sources of funding:

- City, county, state and federal governments;
- Chambers of commerce;
- Community and private or corporate foundations;
- Individual philanthropies;
- Major corporations; and
- United Way.

MENTORING TOOL

See “How to Develop Relationships with Funders,” donor thank you letters and more in the appendix.

Search “foundations” on the Web to see which foundation grants align with your mentoring program goals. If you need to learn more about fundraising or do not have Internet access, go to your state’s nonprofit resource center (each state has one). Your local United Way can usually tell you how to get access to this resource. Also consider getting a subscription to publications, such as the *Chronicle of Philanthropy*, or visit your library and look at current issues of those periodicals.

Once you have identified potential funders you want to pursue, go to their respective Web sites to find out whether your program qualifies for funding. Then follow the guidelines for submitting a letter of intent or a brief proposal. (Many potential funders prefer not to meet with you in person when you are beginning the process.)

In general, most prospective funders will ask for the following:

- A clear statement about the purpose of your proposal;
- The rationale or need for the project;
- Goals/outcomes you expect to achieve and how you will measure your success against those expectations;
- Your strategy for carrying out your proposal;
- A brief review of your organization's background and past successes;
- A budget that outlines how you will use the funds and how you plan to sustain your program in the future; and
- Information on how you will evaluate the program.

Fundraising and proposal writing require solid skills, experience and a network of contacts. If no one in your organization has these skills, you can do the following:

- Educate yourself by reading books and attending seminars;
- Contact your State or Local *Mentoring Partnership* or United Way for help;
- Hire professional fundraisers or proposal writers; and/or
- Scale down your mentoring project.

Check the Additional Resources at the end of this section for resources to help you strengthen your fundraising and proposal writing skills.

DESIGN A SYSTEM TO MONITOR THE PROGRAM

It's critical to monitor your program to make sure it is on track, that you are meeting your program goals and that your programmatic work aligns with your mission. If your work is not furthering your mission, you need to ask yourself why you are doing it.

Review Policies, Procedures and Operations on a Regular Basis

Review your policies, procedures and operations on a regular basis to ensure that they remain relevant to your mentoring program or to determine if you need to create new ones to better meet your program's needs.

Your mentoring program should have policies and procedures for hiring and retaining employees; communicating and safeguarding the rights of employees and volunteers; managing risk; managing crises; following general regulations (on such issues as volunteer records or health and safety); interviewing and selecting mentors; and monitoring mentoring relationships.

Collect Program Information from Mentors, Mentees and Other Participants

MENTORING TOOL

See participant applications and agreements in Section VI on the CD.

The structure of your program will determine what specific information you need to collect to monitor success. The following are some of the records management and program evaluation forms you want to maintain:

- *Mentor application*—provides the program coordinator with demographic data, information for screening and matching, reasons for participating, available hours and references.
- *Mentee application*—states potential participants' reasons and goals for enrolling in the mentoring program and the qualities they would like in a mentor.
- *Mentor/mentee agreement*—spells out the purpose and expectations of the mentoring program, its duration and expected participation, and secures commitment in writing from both mentor and mentee. These forms also give program staff permission to disclose relevant information about the mentee to the mentor.

- *Program participation log*—tracks hours and types of interaction between mentors and mentees. This log records weekly contact, including telephone calls (or attempts), attendance of mentor and mentee at scheduled events and independent meetings or outings.
- *Attendance and participation records*—track attendance at group activities.
- *Volunteers' expense forms*—detail the nature and amount of expenses, if mentors are to be reimbursed for costs.
- *Action plan*—outlines specific program and mentor/mentee goals and documents each participant's progress toward them.

Continually Assess Customer Service

Monitoring participant feedback is one way to measure your customer service, checking to see if you are meeting the needs of your participants, providing adequate training and support and adhering to the mission and goals of your program. Remember, your program is only as good as the customer service you provide.

CREATE A PROFESSIONAL STAFF DEVELOPMENT PLAN⁵

When you are recruiting staff and volunteers for your mentoring program, it's important to ensure that they are qualified and supportive of your program's mission. (Many mentoring programs have a small core staff and use volunteers for some administrative duties.) Because your staff members interact regularly with program participants and stakeholders, they are key to providing quality program support.

Look for individuals with experience in youth development and volunteer management. In addition, seek out people who have solid communication and listening skills and, in the case of those who will be working with matches, who are skilled at resolving conflicts. To

reduce risk and liability, make sure you fully screen all prospective staff members, including conducting criminal background checks.

Once your staff members are on board, your program coordinator will need to provide an initial orientation and training about the following:

- Your program's mission, purpose and expectations;
- Staff roles versus volunteer roles;
- How to work with a wide range of program participants, including mentors, mentees and their parents/caregivers, school administrators and corporate liaisons; and
- How to recruit, screen, train, match and monitor mentors and mentees.

Provide Ongoing Staff Training

MENTORING TOOL

See a list of staff training topics in Section V on the CD.

The initial orientation and training is only part of a professional staff development plan. Make sure your staff members stay up-to-date on the latest mentoring-related research and products.

Encourage them to visit Mentoring.org and to read the Research Corner regularly. Consider holding an annual staff retreat—it's a great forum for talking about program goals, building a sense of community and keeping employees well informed about happenings in your program. Finally, make sure you recognize staff for their contributions and achievements.

Build on Staff Members' Skills and Knowledge

Your ongoing staff development should build on staff members' skills and knowledge. For example, offer workshops on adolescent development, special needs of at-risk youth and gang involvement. (Your State or Local *Mentoring Partnership* is an excellent resource for ideas and assistance in creating a solid staff development plan.)

ADVOCATE FOR MENTORING

MENTOR/National Mentoring Partnership's Public Policy Council is the public advocacy voice of the youth mentoring movement. The council's mission is to ensure greater support for quality mentoring by federal, state and local governments and to expand the favorable attention given mentoring by the public policy community.

Advocate for Pro-mentoring Public Policies and Funding

To sustain momentum for the mentoring movement, every mentoring program should serve as an advocate for mentoring at the local, state and federal levels. Your first step is to join MENTOR's Advocacy Network, which provides regular e-mail alerts containing public policy updates and advocacy requests on mentoring-related legislative issues. You can sign up by visiting Mentoring.org/take_action. To assist you in your advocacy efforts, MENTOR's "Take Action" section includes a media guide, federal resources on how to contact your legislators, a tool to monitor bills of interest, state government Web sites and more.

Don't be afraid to talk with your legislators about your mentoring program. You may have heard the saying, "All politics is local." It's true—legislators need votes, so they are usually willing to become informed on issues that are important to their constituents.

Build relationships with your legislators and their key staff members by familiarizing them with your program, its impact on the community and the challenges you face. You will benefit, and your legislators will appreciate becoming more informed and having a trusted resource on mentoring. Use the following methods to build relationships with legislators at the federal, state and local levels:

- Send letters to your legislators on issues of concern, and thank them if they help out;

- Attend town hall meetings and other events where your legislators will be present and introduce yourself;
- Meet with staff in legislators' district offices;
- Send updates on your program to legislators; and
- Invite legislators to events that showcase your program and how it affects the community.

When possible, partner with your State and Local *Mentoring Partnership* on their advocacy efforts, as one of their primary roles is to encourage decision makers to adopt pro-mentoring policies and legislation. A strong advocacy effort will pay off in mentoring friendly public policies and more public funding for mentoring.

Encourage Private Sector Leaders to Adopt Pro-mentoring Policies and Provide Funding

Remember to enlist the private sector in your advocacy efforts and engage private sector representatives in your work with legislators. Support from the private sector is essential to the continued growth of the mentoring movement. The private sector can provide resources, including funding and mentors, that will sustain your program. Encourage workplaces to institutionalize a culture of mentoring and to reward employees who mentor.



MENTORING TOOL

See advocacy tools in Section V on the CD.

ESTABLISH A PUBLIC RELATIONS/ COMMUNICATIONS EFFORT

Your public relations efforts should be ongoing and designed to send a message about the need for mentoring and the value of your program 365 days a year. This message should not only educate those outside your program but also keep everyone in your organization on the same page. Everyone who is affiliated with your mentoring program should understand the goals of the program and be able to communicate those goals to outside groups. Establishing and implementing an effective public relations/communications effort is important to ensure that you can recruit and retain mentors, increase public awareness of and support for mentoring and raise sufficient funds to keep your program running. Funders, policy makers, community leaders and the general public all need to know about your program's mission, goals and successes. Your long-term public relations/communications plan should be reviewed on a regular basis to ensure that it reflects your program's changing needs.

Identify Target Markets

Identifying a specific target market is extremely important in recruiting mentors. Examples of target markets are college students, young professionals, members of a current volunteer's school or fraternity/sorority or local businesses that have management training programs. As you develop your marketing plan, it's important to define and understand your target audience. What age range, income level, educational background, employment positions, hobbies and interests and other community involvements are characteristic of this group? Even if your demographics are so broad you can't identify a particular group, it's helpful to be able to "segment" a sample of the population so you can target your marketing efforts to a few distinctive groups.

Start with what and whom you know. Ask current mentors what groups they belong to and how best to target your message to those groups. Your mentors may even take it upon themselves to market the program to their peers and colleagues. Identify the groups

that are most likely to respond positively to your message and develop a realistic timeline for contacting and following up with each group. Highest priority should be groups with which you or your mentors already have a relationship. Second, reach out to groups where you have a contact. Be realistic with your marketing timeline—remember that the goal is not only to recruit new mentors but also to develop a relationship with the group so that the group is always aware of your program as a volunteer opportunity in the community.

After you've identified your target audience, ensure that your marketing efforts match the identified "needs" of this audience. One way to do this is to test market the "product" with a few members of the audience. If you have money, hold a series of focus groups. If not, identify several target audience members and market your program to them. Listen and respond to comments from your focus groups or test market participants.

Develop a Marketing Plan⁶

A marketing plan is an organized program of activities that promotes your organization for one or more purposes, usually to build community recognition, recruit volunteers and obtain funding. Generally, a plan incorporates several marketing elements, such as printed promotional materials, advertisements, radio announcements, public presentations and other events. The thread holding these activities together is a common goal with common communication messages.

MENTORING TOOL

See "Marketing Plan," "Tips for Working with the Media" and public service announcements in Section V on the CD.

A marketing plan builds awareness and informs your target audience about what you are trying to do and why. Most important, it asks people to do something: be a mentor, donate time or money for your organization's cause, or participate in an event.

In practical terms, basic marketing includes the following:

- Defining and understanding each audience you want to reach;
- Defining the “offer” you want to make—what it is you want from each audience and what they can expect in return;
- Communicating the offer to each audience;
- Creating the mechanisms for making the “transaction”; and
- Implementing procedures and practices that foster positive relationships and build loyalty.

Effective planning for marketing is one of the most critical activities your mentoring program can do to ensure its success. Two key components of this activity are developing an annual plan and conducting quarterly planning reviews, which enable you to incorporate input from key staff, board or advisory group members and other stakeholders:

1. **Develop an annual plan** that includes goals and objectives of the overall program and its various components (e.g., number of calls received asking for information, number of new mentors, number of invitations to speak, number of mentors who stay active after the first year, number of new donors, increased average gift amounts); strategies to achieve those goals; a timeline of activities; and allocation of people and money to achieve the plan. Don't forget to plan high-profile marketing efforts around National Mentoring Month in January.
2. **Conduct quarterly planning reviews** that include adjustments based on evaluation of recent activities, new opportunities in your local community and current resources.

Put together a marketing plan that addresses each audience you identified earlier. If you're reaching out to young professionals, distribute marketing materials

to local businesses such as fitness clubs and coffee shops. Reach out to professional and networking groups to advertise your program in their newsletters, and offer to give presentations at their meetings. Be sure to close the deal. If you give a presentation to a local group, follow up with attendees by inviting them to attend your next mentor orientation. If they are not available, keep them on your prospect list and continue to send them information about your program throughout the year.

NATIONAL MENTORING MONTH

Since 2002, January has been designated as National Mentoring Month. Led by the Harvard Mentoring Project and MENTOR/National Mentoring Partnership, National Mentoring Month and its activities focus attention on how mentoring benefits the child, the adult and society as a whole, and provide an opportunity to thank mentors and encourage others to share the experience and become a mentor.

National Mentoring Month celebrates mentoring and the positive effect it can have on young lives. Its goals are to:

- Raise awareness of mentoring in its various forms;
- Recruit individuals to mentor, especially in programs that have a waiting list of young people; and
- Promote the rapid growth of mentoring by recruiting organizations to engage their constituents in mentoring.

Visit Mentoring.org for information on how to participate in National Mentoring Month.

A final tip for effective marketing is to develop a strong, focused message. Everyone in your organization and every piece of program literature should follow the same message. A clear mission statement will lead the way toward developing a catchy program slogan, a strong, concise program description and core messages targeted at your chosen audience. In communications, “reach” and “frequency” are important terms. *Reach* is ensuring that your message gets to your target audience—the people you want to inform about your program. *Frequency* means that people may have to hear your message a number of times before they become aware of your program and take action.

Gather Feedback from All Constituents

Earlier in this section, under “Design a System to Monitor the Program,” we outlined the importance of having a system in place to collect feedback from mentors and mentees. In addition to participant feedback, you need to hear from all the stakeholders in your organization, including board or advisory group members, donors, staff, partners and the general public. To gather participant feedback, ask questions during your monthly contact with participants, conduct focus groups or send out a survey. Another easy way to solicit feedback is to add a link on your program’s Web site.

Recognize Program Participants and Sponsors

It’s extremely important for your program to recognize the contributions and achievements of all participants. By incorporating recognition into your public relations efforts, you can accomplish two goals at once: recognizing participants and publicizing the program. For example, by publicizing the story of a particular mentor/mentee pair, you not only acknowledge their success but also use their example to highlight the overall accomplishments of your program and generate additional interest and publicity. For more information on recognition, see Section VI, How to Structure Effective Program Operations.

PARTNER AND COLLABORATE WITH OTHER ORGANIZATIONS⁷

MENTORING TOOL

See “Seven Keys to Successful Collaborations” in the appendix of Section V.


Whenever possible, collaborate with organizations in your community that share a similar mission. If there is an overriding mission for all partnering groups to focus on when times get tough, it will make the collaborative effort much more successful.

Mentoring programs that develop partnerships with other organizations enjoy many benefits, including the ability to:

- Expand services to reach a wider audience;
- Develop a greater understanding of client needs;
- Improve communication with other youth-serving organizations;
- Increase knowledge of resources and services available to mentees, mentors and mentoring program staff;
- Ensure the sustainability of the mentoring program;
- Increase visibility with the media and public;
- Reduce costs; and
- Conserve resources.

For a collaborative effort to succeed, all participating organizations must jointly resolve the following issues:

- Establish a clearly defined mission;
- Establish goals, objectives and activities;
- Create clearly defined operating procedures and member roles;
- Develop a public relations/communications plan; and
- Ensure that the collaborative efforts are valued by all.



Collaboration with other community organizations can have a wide range of benefits for your program—and for the entire community. Before you approach a potential partner, take the time to think about collaboration from the partner’s perspective. Is it worth their time, money and effort to work with your program? How will their organization (or company) benefit from the partnership? Be prepared to explain these benefits in terms that will help them understand the value of working with you.



MENTORING TOOL

See a list of State and Local *Mentoring Partnerships* in Section I.

If you follow the *Elements* outlined in this section and customize the sample tools to address your program’s needs, your program will be well managed. We also encourage you to contact your State or Local *Mentoring Partnership* for assistance in adhering to the *Elements* described under Program Management.



Checklist of Program Progress: PROGRAM MANAGEMENT

As you work to ensure that your program is well managed as outlined in the *Elements of Effective Practice*, use the checklist below to gauge your progress. Checking off items on this list indicates that you are putting the proper components in place to grow a quality, sustainable program.

If your program is already well established, you can use the checklist to gauge the soundness of your current policies, procedures and organizational structure.

Note: The design, focus and structure of your program may mean that some of these components will not be applicable or will need to be modified to match your specific program structure.

1. Form an Advisory Group

- Our program has a diverse advisory group and/or board of directors that are representative of the community that we serve with clearly defined roles and responsibilities.
- We have invited representatives from other youth service agencies to be on our advisory group and/or board of directors.
- Our advisory group meets on a regular basis.

2. Develop a Comprehensive System for Managing Program Information

- Our program maintains financial records and follows accepted accounting practices.
- Our program maintains appropriate personnel and volunteer records.
- Our program uses written work plans with defined targets and benchmarks to monitor mentor/mentee matches and assess progress in meeting program goals.
- Our program maintains records of mentor/mentee matches and program activities.

- Our program provides for confidentiality of records as needed.
- Our program documents situations that are relevant to our risk management plan.
- Our program documents program evaluation efforts.

3. Design a Resource Development Plan that Allows for Diversified Fundraising

Established resource development committee

- Our program has formed a resource development committee composed of members of our board, with volunteers, advisory group members and program staff serving as needed.
- Our committee has taken ownership of planning and conducting our resource development and established a regular schedule for meeting.

Assessment of external resources

- Our resource development committee has mapped out both current and potential external resources.
- We have a solid understanding of the support from foundations, government agencies, individuals, local businesses and special events that we currently receive and that may be available to us in the future.
- Our assessment of external resources included such things as in-kind donations, volunteers' time and other non-financial support.

Written resource development plan

- We have an established, written resource development plan based on an assessment of current and potential resources.

- Our plan has clear goals, objectives, strategies and timelines that are reasonable and appropriate for our program.
- Our plan assigns clear roles and responsibilities related to resource development.
- Our resource development committee members have the necessary skills and experience.
- Our program has implemented a system to track the progress of the plan and to revise it as needed.
- We have a contingency plan that provides how best practices would be maintained if funding were cut or lost.

4. Design a System to Monitor the Program

- We review our policies, procedures and operations on a regular basis.
- Our program regularly updates our board of directors/advisory group on the program's progress.
- We use written work plans with defined targets and benchmarks to monitor mentor/mentee matches and assess progress in meeting program goals.
- We collect program information from mentors, mentees and other participants.
- We continually assess customer service.

5. Create a Professional Staff Development Plan

- Our program regularly conducts staff training to ensure that our staff has sufficient competency.
- We build on staff members' skills and knowledge by ensuring that they are aware of outside training and resources.

Qualified and trained staff

- Our program has developed job descriptions for all positions, which include information about minimum background knowledge, skills, prior experience and other qualifications.

- Our program screens applicants for both suitability to the position and issues of safety and liability.
- Our program supports our staff by:
 - Orienting and training new staff members;
 - Offering staff development opportunities; and
 - Checking in regularly with key staff members.
- Our program incorporates mentoring research and best practices into our training of volunteers and youth.
- Our program encourages staff to take the time to review new mentoring research as part of ongoing professional development.

Access to training and technical assistance services

- Our program is aware of local, state and national training and technical assistance resources.
- Our program has developed a small in-house resource collection of mentoring research, how-to guides and other relevant resources.
- Our program encourages staff to network with other mentoring professionals and receive necessary training as part of ongoing staff development.

6. Advocate for Mentoring

- We advocate for pro-mentoring public policies and funding at the local, state and federal levels.
- We have joined MENTOR's Advocacy Network.
- We encourage private-sector leaders to adopt pro-mentoring policies and provide funding.

7. Establish a Public Relations/Communications Effort

- Our program has inclusive language and images in all marketing materials (brochures, website, posters, flyers, public service announcements, etc.)

Community awareness of the program

- Our program understands the connection between our reputation in the community and the achievement of our goals.
- We have developed a process for gauging our community's perceptions and awareness of our program.
- Our program has identified target markets.
- Our program utilizes community partnerships and contacts to increase awareness of the program.
- We have developed a marketing plan that increases community awareness through:
 - Print/radio/television/Web media;
 - Newsletters to partners and key community members;
 - Flyers and brochures;
 - Appearances and presentations at local events;
 - Testimonies from current mentors and mentees;
 - Other methods of inviting the community to be part of our program;
 - Networking through key community contacts;
 - Use of evaluation results to highlight program successes; and
 - An assessment tool that examines the effectiveness of our outreach efforts.
- We gather feedback on our program from all constituents.

Effective partnerships and collaborations with other organizations

- Our program has a written Memorandum of Understanding (MOU) that documents our partner agencies' roles and responsibilities.

- Our program has developed a process to ensure that the obligations of the MOU are met when staff turnover occurs at partner organizations and among our own personnel.
- We have identified a designated contact person at each partner organization.
- We have developed a process for handling situations in which a partner agency is not fulfilling the obligations agreed upon in the MOU.
- Our program regularly updates partners as to the progress of the program and the fulfillment of roles and responsibilities.

Collaboration and networking with other local youth-service organizations

- We have a clear understanding of the services available to youth and families in our community based on our initial needs assessment survey.
- Our program has established partnerships and collaborations with other youth service providers in the community.
- We regularly refer youth and their families to other services in the community for assistance with needs that are outside the scope of our program.

Recognize program participants and sponsors

- We have recognition events and opportunities scheduled throughout the year for mentors, mentees, other program participants, funders and organizations that sponsor our mentoring program.

Adapted from *Checklist of Program Progress*, Oregon Mentors, *Youth Mentoring: A Primer for Funders*, The Connecticut Mentoring Partnership and *Elements of Effective Practice*, second edition, MENTOR/National Mentoring Partnership.



Additional Resources

Advisory Group

- Board Development
www.boarddevelopment.org
- BoardSource
http://boardsource.org
- **Corporation for National & Community Service, National Service Resource Center:**
 - Recruiting for an Advisory Council
http://snipurl.com/NSRC_advisoryrecruit
 - Training Advisory Councils
http://snipurl.com/NSRC_advisorytrain
 - Nurturing Positive Relationships with an Advisory Council
http://snipurl.com/NSRC_advisorynurture

Program Information Management

Risk Management

- **Nonprofit Risk Management Center (NPRMC):**
www.nonprofitrisk.org
 - Newsletter (free to nonprofits and government agencies)
http://nonprofitrisk.org/nwsltr/newsltr.htm
 - Nonprofit CARES (online assessment tool)
http://nonprofitrisk.org/cares/cares.htm
 - *No Surprises*, Volunteer Risk Management Tutorial
www.nonprofitrisk.org/tutorials/ns_tutorial/intro/1.htm
 - Risk Management Tutorial for Nonprofit Managers
www94311.temp.w1.com/tutorials/rm_tutorial/1.htm
 - “Strategic Risk Management: Looking at Both Sides Now,” By Melanie L. Herman and George L. Head, Ph.D. *http://nonprofitrisk.org/tools/archive/strategy09272002-w.htm*
 - *Insurance Basics for Community-Serving Programs (1994)* by Charles Tremper and Pamela Rypkema
http://nonprofitrisk.org/csb/csb_ins.htm - instop
 - State Liability Laws for Charitable Organizations and Volunteers
www.nonprofitrisk.org/pubs/PDFs/ssl_01rev.pdf

- Risk Management Resource Center
www.eriskcenter.org
- Public Risk Management Association
www.primacentral.org
- Risk Management Library, Management Assistance Program (MAP) for Nonprofits, Assembled by Carter McNamara, MBA, PhD, Authenticity Consulting, LLC
www.managementhelp.org/risk_mng/risk_mng.htm
- MENTOR/National Mentoring Partnership's Online Community Forum on Risk Management
www.mentoring.org/community

Articles and Books on Risk and Liability

- *Mentoring Essentials: Risk Management for Mentoring Programs*, Dustianne North, MSW, and Jerry Sherk, MA, 2002
www.emt.org/userfiles/RiskManagement.pdf
- *More Than a Matter of Trust: Managing the Risks of Mentoring*, Nonprofit Risk Management Center, 1998
www94311.temp.w1.com/pubs/mentor.htm
- *Screening Volunteers to Prevent Child Sexual Abuse: A Community Guide for Youth Organizations*, National Collaboration for Youth, 1997
www.nydic.org/nydic/library/publications/pub_detail.cfm?pub_id=148&mode=view

Resource Development

- Association of Fundraising Professionals
www.afpnet.org
- Council on Foundations
www.cof.org
- Department of Education (sample proposal)
www.ed.gov/about/inits/list/fbc/mentoring.doc
- Forum of Regional Associations of Grantmakers
http://givingforum.org
- GrantStation
www.grantstation.com
- The Foundation Center
www.fdncenter.org
- The Grantsmanship Center
www.tgci.com/

- Nonprofit Genie (free series of fundraising questions and answers, written by fundraiser Kim Klein)
www.genie.org (click on “FAQs,” then “Fundraising”)
- *Fundraising for the Long Haul*, Kim Klein, May 2000

Advocacy

- Independent Sector
www.independentsector.org/programs/gr/advocacy_lobbying.htm
- *Library Advocate’s Handbook*, American Library Association, 2000
www.ala.org/ala/advocacybucket/libraryadvocateshandbook.pdf
- *Nonprofit Lobbying Guide*, Charity Lobbying in the Public Interest
www.clpi.org/
- Take Action Section, MENTOR/National Mentoring Partnership
www.mentoring.org/take_action/

Public Relations/Communications

- *A Guide to Working with the Media*, Corporation for National and Community Service
www.nationalservice.org/pdf/media_guide.pdf
- “Mentoring, Marketing, and the Media: Working Effectively with Local News Outlets,” Susan G. Weinberger, February 2004, *National Mentoring Center Bulletin* 2(1):1–9.
www.nwrel.org/mentoring/pdf/v2n1.pdf
- *Mentoring: A Guide for Local Broadcasters*, National Association of Broadcasters in partnership with the Harvard Mentoring Project
www.mentoring.org/mentoring_month/files/nab_guidebook.pdf
- “Working with the Media,” *Office of Juvenile Justice and Delinquency Prevention, Bulletin*, U.S. Department of Justice, National Network for Youth, March 2000
www.ncjrs.org/pdffiles1/ojjdp/178998.pdf

Marketing

- *Developing Media Messages for Volunteer Programs*, Points of Light Foundation, 2002
www.jjhill.org/poll/showInd.cfm?lngID=1389

Collaboration

- *The Community Collaboration Manual*, National Assembly of National Health and Social Welfare Organizations, January 1991
www.nassembly.org/nassembly
- *Collaboration: What Makes It Work*, 2nd Edition, Wilder Foundation, 2001
www.nassembly.org/nassembly/spotlight.htm



SECTION V TOOLS ON CD

* Select tools denoted with an asterisk also appear in the print version of the tool kit.

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- Donor Thank You Letter
- Donation Thank You Letter with Mentee Insert
- Donation Thank You Letter with Mentor Insert

Professional Staff Development

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PROGRAM MANAGEMENT TOOLS



MEMBER, BOARD OF DIRECTORS JOB DESCRIPTION

POSITION

Member, Board of Directors

GENERAL STATEMENT OF DUTIES

The primary responsibilities of the (*name of program*) Board of Directors include setting policy; hiring, firing and evaluating the Executive Director; evaluating the program; representing (*name of program*) in the community; and giving and raising money. The Board works closely with the Executive Director to ensure program effectiveness, quality, and integrity.

EXAMPLES OF DUTIES

- Develop and implement plans for fundraising;
- Review and approve budgets to ensure financial solvency;
- Approve program plans and authorize implementation of new or modified programs;
- Develop short- and long-range plans;
- Evaluate the effectiveness of the organization in fulfilling its mission;
- Provide guidance to the Executive Director;
- Establish Board objectives and monitor degree of achievement;
- Represent our program to the public, including sources of financial support;
- Communicate public needs and interests to our program;
- Fulfill legal responsibilities by adhering to applicable federal, state and local laws in governance of our program;
- Establish and update required policies;
- Actively serve on at least one committee and participate in decision making by attending Board meetings;
- Nominate and elect new Board members;
- Meet minimum financial commitments set by the Board;
- Assist with special program projects; and
- Participate in all fundraising events.

HOURS

Meetings are held on (*day*) from (*timeframe*). They are held at (*meeting location*).

QUALIFICATIONS

Our Agency strives to maintain a variety of skills and talents on the Board. Examples of qualifications sought include excellent organizational skills, management background, knowledge of local community and resources, outstanding communication skills, ability to work well with a wide spectrum of people, creative thinker, self-starter, budget/financial/fundraising experience, public relations background and human resources expertise.

Courtesy of Friends for Youth, *Document Kit*, 2003; available at www.friendsforyouth.org.



TIPS FOR DEVELOPING RELATIONSHIPS WITH FUNDERS

Fundraising begins at home:

- Remember that fundraising is not only the job of the executive director or program director—get your board and volunteers involved as well.
- When you recruit board members, be sure to let them know they or their company/organization will be expected to make a contribution.
- Conduct feasibility studies to determine the potential for board giving.
- Ask board members to write a personal check; stress to them how other funders look for 100% board participation in giving.
- Involve your board in developing a balanced fund development plan.
- Remember, “friend raising is just if not more important than fundraising.”

Assess your current and future fundraising potential:

- Develop a clear picture of your current sources of funding.
- Determine your future needs, both short term and long term.
- Determine what funding sources you can target—public funding, foundations, individuals, corporations, etc.
- Project when each funding source will end so you can plan ahead to engage new funders.
- Develop a three- to five-year plan; it often takes this long to cultivate and engage a new funder.
- Monitor the plan regularly.

Develop a fundraising plan:

- Assess your needs.
- Assess your current fundraising plan and determine how well it meets your current needs.
- Set your goals.
- Plan your strategy—make sure it’s well diversified.
- Develop a one-year calendar.
- Assign roles and responsibilities to board or advisory group, volunteers and staff.
- Implement the plan.
- Evaluate the plan regularly.
- Reassess and revise the plan.
- Determine how you fundraise now.

Your fund development plan should include the following:

- Face-to-face solicitation with individuals;
- Direct mail solicitation of your volunteers and stakeholders as well as the general public;
- Grant writing (federal grants, foundations, corporate foundations);
- Special events such as an annual dinner with auction;
- Telemarketing (*Note: Be sure to find out what percentage of funds raised you will actually receive. Consult your State Attorney General’s office regarding applicable state laws*);
- Sponsorships—for example, ads purchased during National Mentoring Month for which you get a percentage of the price;
- Door-to-door solicitation; and
- Online solicitation—it helps to have the capability to accept charge cards.

Your fund development plan should include the following:

- Matching gifts;
- Product sales; and
- Planned giving.

Why should you diversify?

- A single source could dry up easily.
- You should never wait for a crisis.
- Building a stable, diversified base will give you breathing room.
- Prospective donors and funders will be impressed. They won't invest until they know you're financially stable.

Tips on how to solicit corporate giving:

- Research the corporation to determine its giving priorities, grant guidelines, and when its fiscal year begins.
- On the basis of the subject matter, geographic focus, type of support, and grant range, decide if your needs can be met by the corporation's grant making program.
- If your program fits corporate giving priorities, call six months before the fiscal year begins and ask to meet with the person who oversees this function.
- Send supplementary information about your program (i.e., articles, newsletters) to familiarize the decision makers with your organization.
- Cultivate employees by making efforts to integrate them into your volunteer base as mentors.
- Submit proposals during the first two quarters of the corporation's fiscal year (funding can run out in the second half of the fiscal year).
- Call to invite the contributions manager or appropriate designee to visit the program to be funded.
- Ask for an appointment to present your request in person (e.g., to Human Resources, Corporate Contributions, Community Relations).

What if, in spite of all your efforts, the proposal is rejected?

- Call to find out what could have been improved.
- Ask about a potential date to resubmit the proposal.
- Continue to touch base with the funder, informing it of your organization's milestones.
- Do not give in to their potential requests to alter your focus.

Courtesy of Dr. Susan G. Weinberger, president, Mentor Consulting Group.

MARKETING PLAN

1. Set goals for the following:
 - Public awareness;
 - Funding; and
 - Mentors.
2. Assign one person to coordinate and oversee efforts.
3. Engage the Board (Advisory Group):
 - Provide information;
 - Elicit approval; and
 - Allow Board members to become active marketers soliciting mentors and/or donors.
4. Create marketing materials:
 - Flyers;
 - Brochures;
 - Press releases;
 - Short bulletins suitable for newsletters, religious organizations, civic associations and companies;
 - Draft an introductory letter; and
 - Compile materials into a program packet.
5. Make assignments:
 - Group 1—schools, libraries;
 - Group 2—chamber of commerce, Rotary, Kiwanis and so on;
 - Group 3—religious organizations;
 - Group 4—civic associations, women’s clubs;
 - Group 5—police, fire department, municipal officials; and
 - Group 6—large companies.
6. Report the following to the marketing coordinator:
 - Interim status;
 - Problems; and
 - Follow-up action needed.

Courtesy of Mentoring Partnership of Long Island, *The ABC's of Mentoring*.



PLANNING THE MARKETING OF YOUR MENTORING PROGRAM

Strategy: You can greatly simplify recruitment and public relations tasks, as well as achieve better results, if you identify the benefits for your audience, earmark a budget and devise a month-by-month plan.

MARKETING OBJECTIVES

You must develop clear objectives before proceeding with community outreach and marketing efforts. These objectives are as follows:

- Obtain support for the mentoring concept;
- Obtain funding for the mentoring program; and
- Recruit volunteer mentors and program participants.

The next step is to develop an effective communications strategy, which includes choosing your most important audiences and deciding on the best ways to communicate with them. Marketing your mentoring program is an ongoing process that must be incorporated into the marketing plan for the entire organization.

COMMUNICATIONS STRATEGY

Four basic components of the communications strategy should be included in all materials or presentations promoting your mentoring program:

1. Establish the need for mentoring to enhance support services available for at-risk populations:
 - Include statistics on the client populations. (These numbers are specific to your community.); and
 - Tie your message into your organization's mission and history.
2. Describe program components and activities.
3. List benefits of mentoring program for:
 - Program participants (clients);
 - Mentors; and
 - Community at large (emphasize those groups most important to you).
4. Include an example or case study of a mentoring success story (if possible).

The communications strategy should include different forms of promotion. It is important to choose a form of promotion that is practical and appropriate for each audience. By highlighting specific benefits to specific audiences, you can tailor your message.

The examples that follow provide options for communicating with each audience using specific forms of promotion and highlighting specific benefits.

COMMUNICATING WITH AN AUDIENCE

Audience #1: Business Community – corporations, small business, labor, professional associations.

Objective: To generate mentors, internships/jobs, funding.

Forms of Promotion:

- Mentoring program articles in corporate newsletters and trade magazines;
- Presentations to corporate volunteer councils and private industry councils; and
- Information packet/brochure and letter to community affairs/public relations departments. (Requires telephone follow-up.)

Benefits of Involvement:

- Publicity as an active, positive corporate citizen;
- An increase in the number of self-sufficient individuals and a better educated/trained workforce; and
- More highly motivated employees who are proud to work for an involved, caring organization.

Audience #2: Local Media – TV, radio, newspapers.

Objectives: To position the mentoring program as a new, exciting way of enhancing community support services. To assist in recruitment and funding assistance for general public. To provide mentors, guest speakers and internships/jobs.

Forms of Promotion:

- Send press releases and information packets to community affairs/public relations departments, news departments, columnists and producers of special features (columns or talk shows).
- Position mentoring program as a newsworthy item. Prepare news releases from a variety of perspectives:
 - Unique collaboration among a variety of agencies;
 - Human interest focus on the volunteer mentor (can be tied into volunteer recognition themes);
 - Issue focus on ultimate goal of mentoring program, such as increased job retention, decreased school dropouts, prevention of substance abuse, reduced welfare dependency or career development (can be tied into media's interest in covering a particular issue); and
 - Mentoring relationship, the impact of a one-to-one relationship (can be tied into national service, "points of light" volunteerism angle).
- Develop public service announcements. Work with a TV station to tie into theme of existing media (e.g., Volunteer Connection, Time to Care, Youth Plus; check with your local PBS station, many of which are involved with special features on mentoring).

Benefits of Involvement:

- Less work for media to research news stories; and
- Media organization positioned as concerned corporate citizen and community partner.

Audience #3: Fraternal/Civic Volunteer Organizations – Kiwanis, Lions, Jaycees, Chamber of Commerce, Junior League and so forth.

Objective: To recruit mentors and generate in-kind support.

Forms of Promotion:

- Articles in organizational newsletters/magazines;
- Presentations to members; and
- Letter and information packet to organization's public relations/community affairs person.

Benefits of Involvement:

- Increased opportunity for civic involvement; and
- Recognition of volunteer efforts of members.

Audience #4: Local Government – department of human services, social service, state/city offices of volunteerism, welfare offices.

Objectives: To recruit mentors. To encourage word-of-mouth promotion. To generate awareness among possible mentees.

Forms of Promotion:

- Articles in government newsletters;
- Presentations; and
- Literature/posters in local client offices of welfare/social services.

Benefits of Involvement:

- Expanded network of service;
- Alternative to one-to-one support for clients, which overburdened government offices cannot provide;
- Opportunity to link clients with comprehensive services; and
- New volunteer opportunities for government employees.

Audience #5: Schools/Universities.

Objective: To recruit mentors/program participants.

Forms of Promotion:

- Presentations to board of education, PTAs, university student associations and faculty;
- Articles/feature stories in newsletters and students newspapers; and
- Special events to bring mentors/students/parents together.

Benefits of Involvement:

- Motivated, informed students; and
- Recognition as an active institution responsive to community needs.

Audience #6: Health/Human Services Agencies.

Objectives: To obtain cooperation of the health and human services agencies in the community. To recruit program participants.

Forms of Promotion:

- Articles in nonprofit newsletters/publications;
- Information packet for organization's volunteer coordinator, public relations head, executive director; and
- Task force of service providers convenes to look at impact of mentoring.

Benefits of Involvement:

- Enhanced network of social services;
- Visibility and recognition highlighting cooperative efforts; and
- Increased opportunities for client referral.

Audience #7: Churches.

Objectives: To recruit mentors. To generate awareness among possible mentees.

Forms of Promotion:

- Informal networks of various denominations to publicize need for mentors;
- Church bulletins; and
- Articles in regional religious newspapers.

Benefits of Involvement:

- Opportunity for expanded outreach and ministry; and
- Recognition of church members' efforts.

Audience #8: Community Foundations/Other Funding Sources.

Objective: To generate contributions and in-kind support.

Focus of Promotion:

- Formal proposal focusing on the interests and mission of the foundation.

Benefits of Involvement:

- Visibility; and
- Tangible enhancement of their missions.

Your marketing plan should be detailed but flexible. You will want to take advantage of marketing opportunities. Nearly always, your best opportunities stem from individual success stories and positive program outcomes. Keep a file of success stories—the media love them. They're valuable for recruitment, too.

Plan, too, to develop promotional materials that help achieve your goal. At a minimum, you will probably want

- A mentor outreach brochure;
- A participant outreach brochure;
- A fact sheet about your organization and your mentoring partner; and
- Mentoring program letterhead.

Avoid the temptation to combine the mentor and participant brochures to save money. The benefits are different for each group. A combined brochure will waste money in the long run.

Courtesy of United Way of America and The Enterprise Foundation, *Partnerships for Success: A Mentoring Program Manual* (1990).

I became a **mentor** because I wanted to give.

The thing I didn't realize is how **much** I'd get.



Bill Santa Photography

Give a little time, get a lot in return. It only takes a few hours a month to make a huge difference in the life of a child. Mentoring helps keep kids off drugs, out of gangs and in school so they can fulfill their dreams. And the best part is, you'll not only see what it does for them, you'll feel what it does for you.

FOR MENTORING OPPORTUNITIES IN YOUR AREA VISIT

WWW.IOWAMENTORING.ORG





SEVEN KEYS TO SUCCESSFUL COLLABORATIONS

1. SHARED VISION

Collaboration means that participants are willing to act together to meet a mutually identified need and that they believe the collaboration is useful. It also implies that the participants are willing to trust each other to carry out the mission of the collaboration, while understanding that each participant may bring a different agenda to the effort. Developing a shared vision starts with understanding these different agendas and finding ways to meet the needs of the participants whenever possible. The process continues with participants reaching consensus around the definition of the need or problem and developing a mission statement that guides the group in its decision making and activities. The founding participants must collectively discuss and support the final mission statement. New participants must understand the vision of the collaboration and support the mission.

2. SKILLED LEADERSHIP

Collaborations usually begin with a small group of interested individuals brought together by a catalyst event or by common needs or values. All participants in this initial group have a stake in leadership and in the outcomes. As the collaboration grows, new participants need to feel a sense of responsibility for the success of the group, even if they choose not to take a leadership role.

As the group further evolves, however, new leaders need to be cultivated to ensure that a few individuals are not overburdened and are not perceived as too controlling or monopolizing. Continuity and orderly transitions of leadership are essential.

Here are some characteristics and skills that good collaboration leaders might possess:

- Ability to guide the group toward meeting the collaboration's goals, while seeking to include and explore all points of view;
- Comfort with consensus building and small-group process;
- Respect in the community and knowledge about the issues the collaboration will address;
- Skill to negotiate turf issues;
- Belief in the process of collaboration;
- Knowledge about the community and organizations in the community;
- Skill and persuasiveness in oral and written communication; and
- Time to commit to leadership.

It is also a good idea to find out whether any participants have had experience in starting collaborations or other forms of cooperative action and seek to involve them as leaders or advisors.

3. PROCESS ORIENTATION

While collaborations live by their results, the process of collaborating is itself an end worth pursuing. Attention always needs to be focused on the process of including people in the shared decision making of the collaboration. Many groups strive for consensus. This ensures the opportunity for all participants to have input and gives minority opinions a full hearing.

Because participants always “come to the table” with their own agendas, it is important to maintain the focus on the agreed-on mission, while simultaneously striving to meet participants' needs.

Some form of conflict is natural as various parties engage in collaborative efforts. Change brings about a certain degree of discomfort and disagreements over turf. The key is to manage the conflict and channel it into useful solutions. When conflict occurs, it must be addressed sensitively, using effective communication skills.

4. CULTURAL DIVERSITY

The collaboration must be open to the richness that comes from including members of different cultural, racial, ethnic and income groups. It must recognize the commonality of all human beings, while treasuring the unique aspects that various cultures bring. Understanding differences in language, customs and values is vital.

If there were no differences among groups, life would be less exciting—and there would be little need for collaborations. Members of each culture need to examine their own assumptions about other cultures and act to correct misunderstandings. Collaborations provide the “common ground” for this to occur. Participants need to devote the necessary time and energy to ensuring that they communicate clearly with members of other cultural groups. Often the effort needed to communicate successfully with someone from another culture results in a new perspective on the topic and creative solutions to problems.

5. MEMBERSHIP-DRIVEN AGENDA

Groups join collaborations to meet organizational needs. Participants must acknowledge and clarify their needs to allow as many individual needs to be met as possible. People need to feel important and included. Ongoing assessment on how well the collaboration is meeting the needs of its members enhances the viability of the group.

All participants should contribute resources to the collaboration. Many successful collaborations, especially at first, receive most of their resources from their members. These resources may include time, space, contacts, in-kind resources or financial resources. When members contribute resources, their sense of ownership in the collaboration is increased. But there should be a balance in the relative level of contributions from various participants. Sometimes, organizations that contribute large amounts of resources accrue a disproportionate amount of power. While this is sometimes unavoidable, it can prevent other members from feeling included.

6. MULTIPLE SECTORS

Successful collaborations seek to include as many segments of the community as are compatible with the mission of the collaboration. Collaborations exist to represent certain viewpoints or stands on issues or they seek to bring together organizations in a particular endeavor. They establish the criteria for participation to guide them in making appropriate matches between new members and the mission of the group.

Some collaborations purposely limit participation to ensure that members’ goals are consistent with the group’s mission. Advocacy groups generally include only those organizations that share consistent values or positions on the group’s issue(s). Others limit participation because they focus on a particular problem area, such as increasing communication between schools and government organizations that investigate and prosecute child abuse cases.

Some collaborations involve only two or three organizations and are kept small intentionally. These are more properly called “partnerships” and are a viable means of encouraging collaborative efforts.

Other collaborations attempt to mobilize an entire community around an issue or set of issues. For these groups, it is important to be as inclusive as possible. Organizations not likely to be represented need to be brought into the process. Depending on the traditions of the particular community, these often-forgotten groups may include

businesses, grassroots groups, minority and ethnic groups, government, youth and service clubs. One of the strengths of collaborations is that they bring together different segments of the community around a particular need or concern and attempt to forge a new style of working together.

Strength comes from the diversity of the collaboration. Encouraging as much diversity as appropriate for the collaboration is important. Diversity can result in creativity, increased understanding and enhanced political clout. However, tokenism should be avoided! The group must be open to authentically involving all members in the process.

7. ACCOUNTABILITY

Collaborations exist to achieve certain specified results and outcomes. The process of developing a shared vision with appropriate goals and objectives should aim toward these clearly stated results. Accountability means specifying results anticipated at the outset, and then continuously monitoring progress so mid-course corrections can be made. An evaluation of collaboration efforts and results should be planned from the outset to help collaborators decide how various efforts should be modified, expanded or dropped. Attention to accountability in the early stages of building the collaboration helps avoid the temptation to over-promise and helps to set realistic expectations for the collaborators and those the collaboration seeks to serve.



