



NATIONAL MENTORING CENTER BULLETIN



Successful Fund Raising

A mentoring professional offers practical tips for bringing in dollars

by Jodi Jaworski

Mentoring programs, like most other human endeavors, require money. But money (as everybody knows!) is not easy to come by. Securing the funds needed to operate a high-quality program takes more than just good intentions. Planning, teamwork, diligence, and enthusiasm are critical to effective fund-raising efforts.

To help ensure the success of your program's fund-raising efforts, I propose a six-step formula for pulling in those essential dollars:

- Choose your fund-raising attitude
- Diversify your funding base
- Familiarize yourself with funding resources
- Create a plan
- Work your plan with enthusiasm
- Take time to celebrate success

Step 1: Choose your fund-raising attitude

Fund raising is not one person's responsibility. To be successful, fund raising must be a team effort. Every agency stakeholder has a role to play in raising funds for the organization. For many, the thought is followed by a heavy sigh because fund raising is hard work, and more work is not something you need on your agenda. However, fund raising is everyone's business. So the first step to successful fund raising is to choose your attitude. You can look at fund raising as lots of work that requires begging people for money, or you can choose to be proud of your role and accept the awesome opportunity you are providing to others to make a generous and meaningful gift to the lives of our young people.

A story I heard recently helps illustrate this idea: Two brick masons were approached by a news reporter. The reporter asked the first worker, "What are you doing?" His response was to complain that he was virtually a slave, an underpaid bricklayer who spent his days wasting his time, placing bricks on top of one another. He said he worked long hours in bad weather conditions and received little recognition for his efforts. The reporter asked the second worker the same question. His response, however, was quite different. "I am a very fortunate person," he said. "I get to be a part of important and beautiful pieces of architecture. I help turn simple pieces of brick into exquisite masterpieces." Both of their answers were factually accurate. But what a difference in attitude! If your attitude toward fund raising is more like the first worker's, maybe it's time to consider a new viewpoint.

As part of changing your attitude toward fund raising, you must conquer your fears. The worst things that can happen are that someone could tell you no, give less than you hoped for, or put you off until later. Every fund-raiser has experienced all of these responses. The good fund-raiser takes these responses in stride and carries on. It's like the bricklayer who sees cathedrals within pieces of bricks. That "yes" response may be just around the corner in the next appointment, the next grant, the next letter, the next phone call. If you don't ask, you may miss it. It's important to remember that fund raising is more than asking for money—it's developing the climate in which people want to give to the organization. Your attitude is the single biggest indicator of the climate of your organization. If you are positive about offering donors the opportunity to support

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A suggested format for planning



Mine Our Lending Library for Nuggets of Information

Find everything from fund-raising tips to insights on adolescent development

We have recently added several excellent resources to the Center's Lending Resource Library. Some are brand-new products and publications; others have been out for a while. We have also recently added a new search feature to the Resource Collection page on our Web site. You will now find a button named "New Pubs," which will allow you to view the 20 most recent items added to the collection. For those of you who search the collection often, this should be a time-saver.

Here's a sample of our latest additions:

In Good Company: Tools To Help Youth and Adults Talk (2001)—An outstanding new resource from the ever-popular Search Institute, this guide offers activities, worksheets, and conversation topics designed to stimulate interaction and dialogue between adults and youth. Based on the 40 "developmental assets" identified by the Search Institute, these activities will be very beneficial to mentors and mentees as they attempt to bridge the often awkward communication gap in a mentoring relationship.

A Fine Young Man: What Parents, Mentors, and Educators Can Do To Shape Adolescent Boys Into Exceptional Men (1998)—Esteemed author Michael Gurian continues his examination of the development of young men in this thought-provoking book. The book covers everything from family and peer relations to hormones and emotional development in its attempt to determine what adolescent males need in order to develop successfully. This book will be a good resource for any program or mentor working specifically with a male population.

Finding Funding: A Guide to Federal Sources for Out-of-School Time and Community Initiatives (2000)—A very comprehensive guide from The Finance Project, this resource starts off with an overview of the current state of funding for these types of programs and moves into a fairly detailed guide to acquiring and managing federal funds. Topics include matching funds, what types of programs

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should apply, and a look at the giant pool of money available to states from the tobacco settlement. The last two-thirds of the book is a catalog of over 100 federal programs and grants with detailed information provided for each. This resource can also be downloaded from the Web at: <http://www.financeproject.org/federal.htm>.

A Guide to Public-Private Partnerships for Out-of-School Time and Community School Initiatives (2001)—This excellent resource, also from the Web site noted above, is aimed at community-based programs that are making connections with schools or other government services or at government programs working in the community. It is downloadable at: <http://www.financeproject.org/ostpartnershipguide.pdf>

Developing a Corporate Volunteer Program: Guidelines for Success (1996)—No, it's not a guide to developing a for-profit mentoring corporation that will make you millions. Rather, it's a very good guide for businesses thinking about instituting an employee volunteer program. Short and to the point, the guide for corporate volunteer managers covers the whole process of program development, touching on topics such as determining what type of program will appeal to your employees, getting the approval of the CEO and board, and recruiting people to participate in the program. The book would also be a great resource for mentoring programs wishing to team up with businesses in the community.

Beyond Police Checks: The Definitive Volunteer and Employee Screening Guidebook (1999)—Every program has issues surrounding screening and liability, no matter how well developed their policies and procedures. So chances are good that there will be something in this amazingly thorough guide that your program has not thought of. It starts with the basic principles of screening and moves on to tackle such topics as risk mitigation and developing effective screening instruments. It also offers a number of sample screening forms and interview questions.

Technical Assistance Packets Keep Rolling Out the Door

New resources focus on recruiting, training, and supporting mentors

In the past few months the National Mentoring Center has released several more additions to its acclaimed series of Technical Assistance Packets. These publications are intended to supplement the Center's training materials and offer strategies and tips for tackling some of the biggest issues facing the development of mentoring programs.

Written by the esteemed Public/Private Ventures, the information in these packets is all based on research into the most effective practices for mentoring programs. The newest releases in the series all look at some of the most important facets of running a successful program:

Recruiting Mentors: A Guide to Finding Volunteers to Work with Youth (T.A. Packet #3)—

First unveiled at our national conference in May, this guide examines the ever-present need for effective mentor recruitment. It offers key steps in developing and implementing any targeted mentor recruitment plan, and also looks more specifically at approaches for recruiting mentors from two large groups with great potential: college students and adults.

Building Relationships: A Guide for New Mentors (T.A. Packet #4)—

Based on an extensive survey of mentors and mentees (conducted by P/PV) about their relationships, this guide focuses on 10 effective relationship strategies for mentors. Each relationship suggestion is illustrated through actual quotes from mentors and mentees, highlighting the importance of relationship concepts such as active listening, trust building, and positive sharing. This is the first of the Center's publications written not for program staff, but for mentors themselves. The Center has multiple copies available for programs' mentors while supplies last.

Training New Mentors (T.A. Packet #5)—An excellent resource for program coordinators and staff trainers, this training outline contains a dozen activities for new mentor orientation. The guide is divided into two sections: Mentors' Roles and Expectations, which focuses on the basics of mentor/mentee relationships, and Speaking of Trust, which highlights listening skills and communication development. All activities come with facilitator notes and handouts, and many contain role-playing exercises to help new mentors understand the relationship from a variety of viewpoints.

Supporting Mentors (T.A. Packet #6)—Our newest packet deals with two crucial aspects of program management that are often overlooked: monitoring the matches and offering ongoing training and support for mentors. Closely tracking the mentor/mentee relationship can greatly increase the percentage of successful pairings in your program. Offering continuing trainings and support groups for mentors can vastly improve the qualities of the relationships they have with the youth and lead to increased volunteer retention. This publication examines both of these topics and offers worksheets to help programs determine appropriate policies and strategies.

As with all of the Center's materials, these packets are available free of charge. They are also public-domain, so programs may reproduce them or incorporate elements of them into their own materials (provided they credit the National Mentoring Center). Programs can receive copies of these publications by contacting Technical Assistance Specialist Kathy Schaeffer at 1-800-547-6339, ext.124, or via e-mail at schaeffk@nwrel.org. ■

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Funds: (continued from page 1)

“To be successful, fund raising must be a team effort. Every agency stakeholder has a role to play in raising funds for the organization.”

your mentoring program, they will feel privileged and positive about giving.

Step 2: Diversify your funding base

The second step to a winning fund raising strategy is to diversify your funding sources. Often, we get comfortable with our few big donors or our sizeable government grant and assume that those funds will last quite a while. The reality of the situation is that no mentoring organization can rely on a single source of funding. It is important to seek out many funding sources and create a broad base of resources to support your program.

There are many reasons why you should diversify your funding sources. First, a stable, diversified funding base is desirable in the eyes of prospective donors, particularly foundations and corporations which often look at an organization's financial stability before deciding whether to invest money in it. Second, integrating new funding sources gradually, rather than waiting for a crisis, makes it possible to fund growth and change. Basically, you are using current income to invest in the future. Third, building a stable, diversified funding base will ultimately give you a little “breathing room.” Fourth, change is inevitable, and diversification can help prepare the organization so the program is sustained by multiple sources. Finally, there are many untapped sources, and diversifying your funding sources allows you to use creative energy to discover still other sources—to go where no funder has ventured before!

Step 3: Familiarize yourself with funding resources

In order to diversify your funding sources, you must first be aware of the many funding opportunities available. Much like baseball, a batter will face many pitchers and must prepare himself to hit any pitch—even though not every batter will be successful with every pitch, and every program will not find success with all fund-raising opportunities. Many factors, including the size of your program, geographic area, degree of the budget, number of staff members and volunteers, and fund-raising goals, will help determine which funding sources are right for your program. Let's touch on a few of these sources.

Government funding. This includes money secured through government resources on a federal, state, or local level. Examples include JUMP grants, GEAR-UP grants, money from the departments of health, mental health, education, and justice. Governors' discretionary funds, tobacco settlement funds, and welfare-to-work dollars are other good sources. The money secured from these sources can be significant and can provide credibility for leveraging other dollars. The paperwork can be cumbersome and the grants are usually one-time-only opportunities. The key to this type of funding is to plan early, pay attention to deadlines, partner with other agencies (collaboration is key), and make connections with those tied to the money.

Private foundations. There are many reservoirs of money set aside by families, corporations, or interested parties which are allocated for a specific cause or to a particular group. Most often these funds are awarded through a grant-writing process. These funds can be discovered through research and by connecting with agency stakeholders, your board members, volunteers, staff and agency advocates. The funds may be tied to a specific demographic grouping, geographic location, or activity, such as education or after-school programming. The key to foundation funds is to research and build rapport. You can review annual reports of foundations to see what they have funded in the past, and you can also attend informational events to gather information. Build relationships, and don't be afraid to go back and ask again.

Corporate giving. This resource includes donations from any size of company, from corporate giants to ma-and-pa businesses. There is a wealth of possibilities within this source, and the objective is to discover all the connections available. Brainstorm with your staff and board members. Discover who the vendors are that want to continue having the book business or paper business at the school. Appeal to the companies' desire for a strong philanthropic presence in their community. Be aware that a change in the economy can come with a change in corporate giving, but continue to build those relationships. The key to this funding source is to build relationships and be creative in discovering ways to partner with companies. If they can't give money, maybe they can provide mentors. Or you can even encourage both.

Special events. A great way to infuse fun into fund raising is to host a special event. Examples include golf tournaments, dinners, galas, denim days, flower

Fund-raising Grid

Jody Jaworski recommends a simple fund-raising grid such as this to help you create an organized plan. The grid covers the essentials. Action steps can be detailed through a project or action plan form. Planning should be done annually.

FUNDING SOURCE	GOAL	NECESSARY ACTION STEPS	DEADLINE	STATUS
Government	\$200,000	Continue to maintain JUMP money	Ongoing	
Private Foundations	\$5,000—Lutheran Charities \$10,000—Brown Charitable Trust \$3,000—Webb Foundation \$5,000—Trio Foundation Submit Grant	Submit grant Write proposal letter Meet with foundation president Submit grant	Due 3-31-01 Due Jul 2001 Early Aug 2001 Due Nov 2001	
Corporate Giving	\$5,000—Payless Shoes \$3,000—Smith Market \$2,000—Subway \$5,000- Southwest Airlines	Call and finalize gift Meet, plan gift with company president Send letter of request Send letter of request	May 2001 Jun 2001 Aug 2001 Oct 2001	
Special Events	\$15,000—Annual Dinner \$2,000- No Foolin' Denim Day \$10,000- Golf Tournament	Plan event for Feb 2001 Plan event for 4-1-01 Plan event for 7-27-01	Feb 2001 Apr 2001 Jul 2001	
Individual Giving	\$25,000—Indiv board member contributions \$15,000—Annual Appeal \$10,000—Back-to-School Telephone Appeal	ExDir meet indiv w/each board member Plan and conduct appeal Plan and conduct appeal	Summer 2001 Spring 2001 Sept 2001	
Other: United Way, Tax Credits, In-Kind	\$25,000—United Way Donated computers Donated tickets to sports events	Turn in appl, go through allocation process Contact MS about nonprofit donations project Contact sports commission	Jun 2001 Summer 2001 Ongoing	

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“Make sure the plans are clearly stated, identify the individuals responsible, spell out the steps for implementation, and provide a time line for completion.”

sales, or contests. Special events are a great way to build energy and raise awareness for your program—in addition to collecting dollars, you create visibility and goodwill for your program. Special events, however, pose challenges to the program. They can be risky and very labor intensive, and can take years to build momentum. The key is to plan early, secure lots of help and seek champions willing to support the idea and make it happen.

Individual giving. This source is the largest underutilized fund-raising opportunity. Yet individuals are responsible for 80 percent of all charitable contributions. There are several ways to attract the individual donors, including annual appeals, phone solicitation, or one-to-one lunches or meetings. The key to strong individual giving is to build new relationships and cultivate current donors. If carefully cultivated, some of the 10- and 20-dollar donors can ultimately contribute a major gift.

In-kind donations. Sometimes, individuals or corporations will donate products instead of dollars. Examples include computers, office furniture, phone systems, and food. Others may be able to donate services, such as consulting, graphic design work, transportation, Web site development, and speaking/presenting in the community or at program functions. Securing donated services is a great way to cut costs on program expenses.

Other sources. United Way contributions and state tax credits can help secure larger donor contributions.

Step 4: Create a plan

Developing a fund-raising plan prepares your organization for the long haul. The first step of the plan is to assess your program's needs. Make a list of all the resources—money, time, people and material items—necessary for your mentoring program to not only survive, but thrive. Then determine your fund-raising goal. This goal is your target. “Why determine a goal,” you may ask. Well, if you don't know where you're headed, how are you going to know when you get there?

Next, determine your strategy—that is, What are the steps needed to reach that goal? Put these plans in writing. Make sure the plans are clearly stated, identify the individuals responsible, spell out the steps for implementation, and provide a time line for completion. There are many forms which you can use to organize your plans. I recommend you at least

start with a simple fund-raising grid, such as the sample on Page 5. This grid requires you to list your potential funding sources, the intended dollar amount goal to be generated through that funding source, the action steps necessary to accomplish that goal, the deadline and the current status. The necessary action steps can then be described in greater detail through a project or action plan form. This type of planning should be done on an annual basis. It is also important to establish a long-range fund-raising plan. Fund raising and donor development is a long-term process that requires continual, thoughtful planning.

Step 5: Work your plan with enthusiasm

Just do it! After doing your homework, developing your plan and preparing the team, you are now ready to go for it. This means rolling up your sleeves and setting those appointments, making those calls, writing the grants, and meeting with individuals.

While working the plan, don't forget to take time out and go back to the first steps and ask yourself: “Do I have a positive attitude and an enthusiasm that is contagious? Have I paid attention to diversifying the opportunities, or are all my eggs in one basket? Am I clear and creative about what opportunities are available to my organization? Do I have a solid plan, complete with timelines, goals, and strategies for getting there?”

Step 6: Take time to celebrate success

The final step in the fund-raising success formula is to take time to celebrate and have fun! It is important to enjoy one another's efforts in your achieving your fund-raising goals. Don't misunderstand: fund raising is a real business that is run to generate revenue for your program. But it is important to discover that you can be serious about business and still have fun. It is important to enjoy your work—to take pride in what you do and the way you do it. Celebrating program success allows you to find creative ways to engage potential donors. Those are the key words—celebrate and engage. After all, that's what fund raising is really all about—finding ways to draw people closer, and respectfully include them in the fun of mentoring. ■

Jodi Jaworski is Vice President of the Mentoring Institute in St. Louis, Missouri.

Fund-raising Resources

Funding Research

- Corporate Philanthropy Report—1-800-655-5597 or www.grantscape.com
- Dynamic Fundraising Projects—Rick Arledge and David F. Friedman. Chicago, IL: Precept Press, 1992
- Federal Assistance Monitor—Semi-monthly report on federal and private grant opportunities, 1-800-666-6380
- Foundation and Corporate Grants Alert—1-800-655-5597, (703) 683-4100 or mmudd@aspennpubl.com
- The Foundation Directory—Compiled by The Foundation Center. New York, NY: The Foundation Center, 1998
- GivingUSA Update—A newsletter published by the AAFRC Trust for Philanthropy, New York
- Guide to Federal Funding for Governments and Nonprofits—Charles J. Edwards and James V. Shusters. Arlington, VA:

Special Events:

- Black Tie Optional: The Ultimate Guide to Planning and Producing Successful Special Events—Harry Freedman and Karen Feldman Smith. Rockville, MD: The Taft Group

Government Information Services

- National Directory of Corporate Giving—Compiled by The Foundation Center. New York, NY: The Foundation Center, 1998
- Philanthropy Matters—A publication of the Indiana University Center of Philanthropy (317) 274-4200 or www.tcop.org

Proposal Writing

- Getting Funded: A Complete Guide to Proposal Writing—Mary Hall. 3rd ed. Portland, OR: Continuing Education Publications
- Winning Grants Step by Step—Mim Carlson. San Francisco, CA: Jossey-Bass Publishers, 1995

Online Resources

- www.philanthropy.com—The Chronicle of Philanthropy's guide to grants.
- www.granted.org/nationwide.html—Contains an alphabetical listing of current links to nationwide foundations
- www.fdncenter.org—The Foundation Center
- www.fundsnet.com—Fundsnet Online Services
- www.nonprofit.gov—NonProfit Gateway
- www.nydic.org—National Youth Development Information Center

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The Virtual Volunteering Guidebook: How to Apply the Principles of Real-World Volunteer Management to Online Service (2000)

—For those of you bent on sending your volunteers into cyberspace comes this handy guide for managing online services. Written by volunteer management experts Susan Ellis and Jayne Cravens, this resource serves as a primer for laying the groundwork and getting a virtual volunteering program up and running. With the explosion in the popularity of e-mentoring, this will be a valuable resource for programs looking at that service. It offers a more general "virtual" perspective than many of the mentoring-specific guides, which often just focus on program monitoring and liability concerns. This guide takes a step back and really looks at the overall vision of such a project. You can borrow this guide from us, or download it from the Virtual Volunteering Project Web site (<http://www.serviceleader.org/vv/book.html>) or the Energize Inc. Web site (www.energizeinc.com).

Volunteer Management: Mobilizing All the Resources of the Community (1996)—A very thorough and detailed look at all aspects of volunteer program development and management.

It covers everything from designing an effective program to recruiting, screening, training, and supervising volunteers. It also touches on retention, evaluation, liability issues, and just about anything else connected to volunteer management.

—Michael Garringer

Lending Info

All of the materials in the Lending Library are available nationwide via Interlibrary Loan at your local public library. OJJDP-funded JUMP programs may request items by contacting the Center via e-mail or phone.

To search the collection and read our lending policy, please visit the Library search engine at: www.nwrel.org/mentoring/resources.html.

If you have any questions regarding the Library please call Resource Specialist Michael Garringer at 1-800-547-6339, ext. 647.

National Conference Wrap-up

The Center's first National Mentoring Conference, held in May in Alexandria, Virginia, drew more than 500 mentoring practitioners and service providers for two and a half days of workshops, seminars, and networking. The conference emcee, Dr. Susan Weinberger of the Mentor Consulting Group, shares her thoughts about the event and where she sees the field of mentoring heading in the next few years:

"How exciting to see program directors and mentoring enthusiasts gathered together for the first time in such large numbers at the mentoring conference. Our heartfelt gratitude goes to OJJDP, the National Mentoring Center, and the National Mentoring Partnership for their hard work and support. Every detail was carried out and participants were heard to say, 'Plan another one soon and longer!' as they left to catch their planes and trains. That is a real tribute to a great first effort.

"We have a pretty good sense from the registrants, representing many countries, that mentoring in 2001 takes all shapes, sizes, and levels. Before the end of the conference, I gave some closing remarks that reflect my hopes for what the landscape of mentoring will look like at the end of the decade. It will mean finding new and diverse ways to meet the changing needs of the young people we serve. I know we can do it. At the end of this decade I hope that we will see more and more directors administering mentoring programs for youth; support from the education leaders and teachers in every state; the needs of youth with infractions of the law being supported by mentors; more group mentoring; more peer mentoring by high school and college youth; more faith-based mentoring; more e-mentoring; support from every governor; a strong voice at the federal, state, and local levels—which translates to adequate funding for mentoring programs; more involvement of the entire family in mentoring; scholarships for young people to finish high school and pursue post secondary education; increased intergenerational mentoring; more men involved as mentors than ever before; more companies releasing employees to become mentors during the work day.

"I know we will be there in 2010! Please join us in the crusade. The youth of this nation will surely be the beneficiaries. See you at the next conference!"

(Check out Dr. Weinberger's new Web site, featuring her 16 Steps of Effective Practice, at: www.mentorconsultinggroup.com).



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Portland, Oregon
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Northwest Regional

Educational Laboratory

101 S.W. Main Street, Suite 500

Portland, OR 97204

Phone: (503) 275-0135 or 1-800-547-6339, ext. 135

Fax: (503) 275-0444

E-mail: mentorcenter@nwrel.org

Home page: www.nwrel.org/mentoring