

# ENSURING THE FINANCIAL FUTURE OF YOUR MENTORING PROGRAM



**MENTOR**  
CONSULTING GROUP

Iowa Department of Public Health  
Mentoring Program Sustainability  
Webinar Series  
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**Presenter:**

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# Presenter

# Dr. Susan G. Weinberger



**MENTOR**  
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# Dr. Susan G. Weinberger

- Dr. Susan G. Weinberger is the founder and President of the Mentor Consulting Group in Norwalk, CT. She was a pioneer in the creation of school-based mentoring in America in the early 1980s. Today she consults to school-based, site-based, after school, Native American, AmeriCorps and corporate mentoring programs internationally as well as to five federal agencies. Her focus is the design, implementation and evaluation of quality mentoring programs adhering to the Elements of Effective Practice. Susan believes that to ensure sustainability of mentoring programs, staff must engage in comprehensive and effective fundraising.
- Her numerous publications include: *My Mentor & Me series* for elementary, middle and high school; *Preparing my Mentor for Me; Program Funding* (Handbook of Youth Mentoring); *Direct Corporate Support in Sustainability Planning and Resource Development for Youth Mentoring*.
- Dr. Weinberger, affectionately known as Dr. Mentor received President William Clinton's coveted Volunteer Action Award at the White House for her mentoring efforts. She also received the William A. O'Neill Legacy Award from CT Governor Dannel P. Malloy for a lifetime of tireless efforts and advocacy for expanding mentoring to youth. Among her greatest joys is mentoring a young woman since age 7 that is now 29 years old.

# Webinar Series

## Part I - Agenda

- Developing your fundraising plan
- Involving your Board of Directors
- Examining key sources of funding
- What comes first: Mentors or \$\$?
- Individual and Annual giving
- Government funding

# Some Additional Comments – Individual Giving

- A total of 83% of all giving comes from individuals.

(American Association of Fundraising Counsel & Giving Institute)

- Nearly 9 out of 10 families make charitable donations.
- People give to something that satisfies them on a deeply personal level.

# Individual Giving

- Misconception that only persons of wealth give.
- Most annual charitable giving comes from middle-income, working-class, and poor people.
- Study showed that 19% of families living on welfare give away average of \$72/yearly.  
(Arthur Blocks, Syracuse University)
- Seek Advisory Council/Board to help brainstorm all people they know that could give.

# Best Time of Year for the Ask

- Varies but most solicitations arrive in December before the holidays and year-end tax deductions.
- Consider shifting to a request during January, National Mentoring Month. Make it the same date in subsequent years.
- Also consider the value of Thanksgiving- a time to give thanks and to give.
- Annual campaign letter cosigned by you and a Council member who knows them. Have them write a personal note and follow up by phone.

# Webinar Series

## Part II - Agenda

- Corporate and Foundation giving and Engagement – 10 steps
- Matching gifts
- Planned giving
- Program events
- Direct Marketing
- Local Initiatives
- Fees for Program and Product Services

# CHAT BOX

- Answer is simply “yes” or “no.”
- *Is your program a member of the local Chamber of Commerce?*

# Engaging the Private Sector - Business

- Relationship with local Chamber of Commerce.
- **BENEFITS:**
- *Paying for membership: non-profit rates.*
- *Rub shoulders with businesses; serve on committees.*
- *Chamber publishes a list for and about members; potential donors will evolve.*

# Engaging the Private Sector Business

- Decision-makers – typical title of employee making funding decisions:
- Corporate Manager of Community Affairs
- Marketing Manager
- Community Relations Director
- Public Relations Manager
- Foundation Director

# Approaching a Company/Foundation *lots of overlap.....*

- Identify whom among Board, Council, staff and volunteers has a close contact inside the company or Foundation.
- If the company/Foundation already provides mentors, one or two of them become the champions to contact top management. *What comes first – "mentors or money?"*
- Most companies and foundations would rather give to a specific cause or need than general operating.

# Getting to Know the Company/Foundation

## Do Your Homework

- Research the company/foundation's policies for giving to nonprofits, giving priorities, published grant guidelines, beginning and end dates of their fiscal year and what types of requests they honor.
- Read their Annual Report.
- Based on subject matter, geographic focus, type of support and grant range, decide if your needs can be met by their grant making program.

# Research Focus of Business and Foundations

- Employee volunteer and matching gifts (will discuss) programs.
- In-kind donations of services and goods.
- Sponsorship of events.
- Direct cash donations.
- Mentors and tutors.

# Getting to know the Company/Foundation

Are you a *good fit*?

- If your program fits corporate/foundation giving priorities, ask to set up a visit. Invite them to visit your program first.
- Don't waste your time if not a perfect match.

# Remember the A, B, C's

Any company, foundation or agency you plan to approach must be researched first.

- Ability to give you money;
- Belief in your mission;
- Contact in the organization to get YOU in the door.

# FORMS OF CORPORATE/FOUNDATION SUPPORT

## GENERAL OPERATING VS SPECIFIC CAUSE

- **DIRECT UNRESTRICTED TO YOUR PROGRAM**

- **SPECIFIC ACTIVITIES OR PROJECTS:**

Special after-school activity.

Sponsorship of events such as a conference or fundraiser.

In-kind donation of equipment such as furniture or computers.

Transportation to a group activity such as the museum, zoo or baseball game.

Summer program.

Donations to a scholarship program for mentees heading to post-secondary education.

# **IDENTIFY WHO CAN HELP**

## **“open the doors.”**

- **Who among your Board and Council members, volunteers and staff has contacts?**
- **Friend-raising comes before fundraising.**
- **Don't waste time and energy approaching the wrong person that cannot make the decision.**

# Practice Makes Perfect

- Practice your presentation “ask” over and over again in front of the mirror, to your family, friends, and even the family dog.
- Never go alone. Bring a mentor and/or mentee to the “ask.”



# Benefits to the Company

- Expect the company/foundation to ask what is in it for them.
- Be prepared to state the benefits:
  - Publicity in the local press.
  - Recognitions.
  - Placement on a yearly Corporate Honor Roll.
  - National Mentoring Month celebrations.
  - Sponsorship acknowledgements.
  - Website features.

# Bringing Closure

- Never leave an “ask” without discussing next steps.
- Ask when you can expect a decision.
- If your ask is not within their budget, offer to negotiate.
- Send a **thank you note** for the visit.
- In spite of your efforts, what if the company refuses? If your request is denied, never give up. Ask if you can resubmit at a later date.
- Continue to send information about your program’s milestones and successes. It keeps the lines of communication open.

*Never give in to potential requests to alter your “focus.”*

# CHECKLIST

- 1. Identify challenges you will encounter to identify Board, Council and others to help you.
- 2. Tracking system in place to collect data and monitor revenue sources.
- 3. Track mentor alumni to help fund your program.
- 4. Join the Chamber of Commerce.



# Checklist for Practitioners

5. Identify a champion among local, state, or federal legislators.

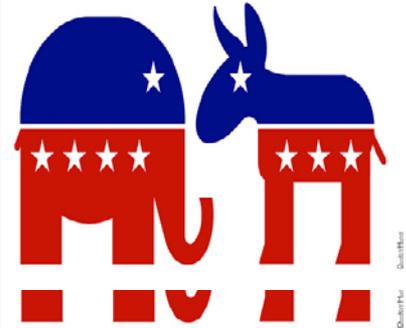
6. Create a list of companies with a strong history of support for your program.

7. Invite attorney and insurance agent to serve on your Council and provide pro bono advice.

8. Written policies in place around fundraising.

9. Timeliness to say “thank you” to donors?

10. Prepare for rejection.



Thank

You

# Mentors or Money

## Benefits of Released Time

**Nation's corporations want employee:**

- Leadership
- Retention
- Productivity
- Satisfaction
- Improved morale
- Service contributions
- Company pride and social responsibility

# Research Indicates Results Employees who Mentor:

- Return to work happier
- Experience satisfaction with and at work
- Have greater pride in the company
- Accept more challenges at work and home
- Feel better about themselves
- Got fresh perspective on their lives
- Are more appreciative of youth from diverse backgrounds
- Increase morale
- Are more loyal
- Improve their own values and beliefs
- Increase sense of responsibility
- Got along with own spouses, partners and children
- ***See the need first hand and want to help financially***

# Corporate Engagement 10 Steps to Success

- 1. Obtain top management endorsement.
- 2. Get top management involved.
- 3. Identify a company liaison.
- 4. Secure release time from supervisors.
- 5. Prepare an application for each mentor.
- 6. Recruit mentors from the company on-site.
- 7. Screening – agency and company.
- 8. Training sessions take place at workplace.
- 9. Company liaison monitors the matches.
- 10. Recognition.
- And.... One more.....Make the \$ ask.

# Research: A Wealth of Benefits within the Workplace

- Ghosh, R. & Reio, T.G. (2013). Career benefits associated with mentoring for mentors: A meta-analysis. *Journal of Vocational Behavior*, 83, 106-116.
- *Mentors: Greater job satisfaction and commitment to the workplace.*
- **Higher quality relationships.**
- *Career support: Greater career success.*
- *Role modeling: Better job performance.*

# Corporate Philanthropy

## Volume 30, No. 4 April 2015

- *Youth Mentoring offers social and business benefits. Mentoring:*
- Engages employees, provides opportunities for skill building and improving retention.
- Develops future talent.
- Strengthens local community.
- Aligns mentoring programs with corporate strengths.
- Fosters employee engagement.
- Facilitates increased peer learning and idea sharing.

# Matching Gifts

- When a potential mentor completes the application, make sure there is a place on the form to ask two important questions: 1. *Do you work for a company?* 2. *Does it have a matching gifts program?*
- A mentor may not know the answer until they ask their employer.

# Matching Gifts

- Process for soliciting matching gifts is not complicated.
- During your annual campaign, track mentors who give financial contributions. Match them with their workplace. Ask each mentor to furnish their company's one-page matching gift form.

# Verify your status

- Your program verifies that you qualify as a 501(c)(3), indicate the amount of the mentor's confirmed gift, mail the form to the company and your program will receive the matching gift directly.
- You can re-apply every year. Has potential to yield big results.

# Planned Giving Lasting Gifts

- If your program has been in existence for a long time, has a strong donor base and keeps accurate tracking records on mentors and alumni, you may be able to begin thinking about planned giving.
- Focus on the motivation of the donor to achieve mortality; for those who care deeply about their involvement in the program and its impact on them.

# Seek help from Professionals

- In order to establish a planned giving program, you should seek help from a professional. Preparing to receive lasting bequests takes time and requires expertise. Small, new or unstable organizations should be discouraged from establishing a program.
- Do you have someone on your Board of Directors whose specialty is planned giving? Pro bono services come in handy.

# Program Events

## Direct Marketing

- Special Events:

Should be a part of any fund-raising. Special events help to create awareness of your program. You can raise both restrictive and unrestrictive funds or for a particular initiative for which you seek support.

*Chat Box: List your special events. I will call them out for all.*

# Examples of Special Events

- Taste of your Town
- Celebrity Dance Marathon – Dancing with the Stars
- Black-tie gala
- Bowl-a-thon
- Walkathon
- Car wash
- Crafts Fair
- Lecture
- Jail-a-thon
- Non-event – guests pay to stay home!

# Third Party Events

Another organization schedules the event; your mentoring program is the recipient of the profits. Limited volunteer time to yield considerable results.

Popular examples: Golf tournament (another organization runs the event, handles the publicity, and designates your program as the recipient of the profits).

# Taking Advantage of Third Party Events

- Research where and when they take place.
- Apply to be the beneficiary long in advance.
- Offer some of your volunteers to assist with ticket sales or selling raffle tickets to show your appreciation.

# Planning for Disaster Special and Third Party Events

- There can be some potential disasters such as: injuries at the event, accidents, someone robbing your cash draw.
- Research the laws that apply to the event. Check on needed permits.
- Check your program's current insurance policy.
- Do you have an insurance agent or attorney on your Board that can assist? Pro bono.

# Direct Mail

- Least effective way to raise money.
- Often involves buying mailing lists from an organization or professional marketing firm.
- Purchase stamps and stationery for a direct mail campaign.
- Well known organizations (B&G Clubs, BBBS) may yield the best results.
- Your mail may get thrown away if the recipient does not know you and your work.
- Other forms of direct donor solicitations: e-mail, internet banners, and a separate page on your website for donor giving. Also social media (Face book, twitter, Instagram) are popular ways to appeal.
- Do you have a web designer on your Board that can help with your website? Pro bono.

# Local Initiatives

- Many organizations want to help non-profits. There may include:
- Social, fraternal and civic organizations such as Lions, Kiwanis, Rotary.
- United Way conducts fundraising campaigns. Can your mentoring program be one of their recipients?
- If one of your Board members is connected to United Way, secure a time with their help to present at a United Way Board meeting.

# United Way Designated Donations

- Unrestricted dollars for distribution is preferred for member organizations but many individuals can make a United Way contribution to qualified non-profits.
- Agency must complete a simply designated donation form. Some of these are now even obsolete.

# Capitalize on Success: Fee for Program and Product Services

- Excellent programs are replicating their models and selling them and materials for a fee.
- First, reflect on your program, age, strong and diverse revenue streams, and continuous expansion of matches.
- Suitable rigorous outcome evaluations that indicate positive results.
- Some programs offer to assist smaller programs or start ups by holding their mentor training sessions, providing curriculum and handling criminal background checks – for a fee.

# Use Program Evaluation to Support the Need

- Give potential funders proof that your program is operating effectively.
- Evidence of program quality (formative evaluation data) and effectiveness (outcome data).

# Thank Donors

- Great resource: *Chronicle of Philanthropy*.
- Mentoring programs can stay current with the non-profit sector and trends.
- Always thank your donors promptly.
- Story in the *Chronicle*: Kivi Leroux Miller: "What I got when I gave experiment." She donated \$20 to each of 10 national nonprofits. One month after sending the gifts, she had heard from only 3 of the 10. *"how can nonprofits expect to thrive off the kindness of others when the kindness of a simple thank you note to an unsolicited donation is too much to ask?"*

# References

- Weinberger, S.G. (2013) Program Funding. In D. L. DuBois & M.J. Karcher (Eds.), *Handbook of Youth Mentoring* (2nd Edition). Thousand Oaks, CA: Sage Publications
- Weinberger, S. (2005a). Direct corporate support. In M. Garringer (Ed.), *Sustainability planning and resource development of youth mentoring programs*. (pp. 41-49). Portland, OR: Education Northwest.
- *Mentoring a Movement My Personal Journey (can purchase on my website or Amazon.com)*

# Contact me

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