

**Transcript of
The Finance Project
Finding Resources to Support
Mentoring Programs and Services for Youth
December 18, 2008**

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Participants

Roxana Torrico, Practice Group Director
Jenny Koltnow, Executive Director, Memphis Grizzlies Charitable Foundation
Carolyn Becic, Executive Director, Oregon Mentors
Linda Gorsuch, Vice President of Development, Big Brothers Big Sisters of Central Maryland and the Lower Eastern Shore

Presentation

Operator

Good afternoon, everyone and welcome to The Finance Project's Finding Resources to Support Mentoring Programs and Services for Youth. At this time, all participants are on a listen-only mode. A question and answer session will begin at 45 minutes past the hour. So participants may submit their questions at any time to rtorrico@financeproject.org. As a reminder, this conference is being recorded.

I will now turn the conference over to your host, Ms. Roxana Torrico, Practice Group Director with The Finance Project. Thank you, Ms. Torrico, you may begin.

Roxana Torrico – The Finance Project – Practice Group Director

Thank you, operator. First of all, I want to extend a big welcome to our panel and participants of today's audio conference on Finding Resources to Support Mentoring Programs and Services for Youth. I'm happy to say that we had an overwhelming amount of interest in this event and hope that everyone is able to benefit from the information that the panel will share today.

My name is Roxana Torrico and I'm a Practice Group Director with The Finance Project. For those of you who may not be familiar with our work, we are a non-profit in Washington, DC and we provide research, consulting, technical assistance, and training for private and public sector leaders across the country.

This event is a part of a series of audio conferences organized through our Youth Programs Resource Center. This resource center offers research, tools, and publications all focused on financing and sustaining youth programs.

The publication featured in today's event is entitled Finding Resources to Support Mentoring Programs and Services for Youth. This publication was made available as part of the background materials for this call.



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In addition to accessing transcripts and recordings from this and past audio conference and webinar events, you can also visit our website to browse the Youth Programs and Policies Clearinghouse which we are continually expanding by identifying and adding new relevant resources from our partners in the field.

As we all know, all programs face financing challenges at one time or another. However, I think that everyone on this panel and the participants listening in today are well aware of the additional challenges that programs are facing and will continue to face in today's economic climate. This will likely include a decrease in funds, staffing challenges, and potentially fewer partners. Therefore today, we want to focus on what resources are available to programs, mentoring programs, and what financing strategies mentoring programs are using and can use to support their effort.

Before I introduce our speakers, I want to first offer some context about financing and sustainability by drawing from The Finance Project's featured mentoring publication. In our research, we have identified promising practices and resources for mentoring programs and services across the country and we have also identified financing strategies so when the funding is cut or the programs have staffing challenges, there are other ways to support and sustain these programs over the long term. But instead of providing you with a list of funding streams for your mentoring programs, we are going to go beyond simply finding funding and talk more about financing strategies which are basically strategic approaches to financing and sustaining mentoring programs and services. For example, building partnerships with businesses or foundations to implement, expand, or sustain your organization or conducting community fundraising events to raise funds to support your effort or maximizing public revenue to contribute to your organization's diversified portfolio.

Our speakers today will each give a unique perspective on the resources available to mentoring programs in their locality. Each of these organizations was featured in the mentoring publication that this event is based on.

But before we go on, please keep in mind, we will open the phone lines for the last 15 to 20 minutes for questions from the audience. But you can submit questions via e-mail by sending them to rtorrico@financeproject.org and you can submit your questions any time during this call.

So I'm going to turn it over to our first speaker, Jenny Koltnow, the Executive Director of the Memphis Grizzlies Charitable Foundation where she works to support mentoring programs serving at-risk urban youth in Memphis. She will be sharing the foundation's current effort and giving a foundation's perspective on what programs need to consider when seeking funding in our current economic climate. Jenny?

Jenny Koltnow – Memphis Grizzlies Charitable Foundation – Executive Director

Thanks, Roxana, and thank you to all the participants today. It's an honor to be part of the panel. I wanted to give everyone a brief overview of the Memphis Grizzlies Charitable Foundation and then offer some insight and some observations regarding funding mentoring programs particularly in this economic climate.

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First of all, just so you all have a lay of the land, the Memphis Grizzlies organization is an NBA team that relocated to Memphis in 2001. When the team got established here that fall, the ownership group decided that our team philanthropy was really going to be an essential part of our organization and very quickly started making substantial grants to non-profit organizations based in Memphis, particularly those who are serving urban at-risk youth. Over the last 6-1/2 years or going on 7 years, we've contributed over \$21 million to Memphis area non-profit organizations which is pretty significant... pretty really relative to other professional sports organizations. But like I said, our focus has continued to be on the needs of youth in our community and as many of you may know, there's a very high poverty rate and tremendous need among youth in our region.

As time's gone on, we've supported organization ranging from grassroots organizations that were just getting off the ground to schools to organizations with national profile like boys and girls clubs but we've consistently maintained that the youth outreach was foremost priority. It was in 2004 when a formal foundation had been established to facilitate this grant making and also to create a more substantial and distinguishable entity to support this direction but also to really bolster a new focus which became youth mentoring. The foundation was established in the fall of '04 and very immediately we got connected to a number of established mentoring programs and that's when we first established our relationship with the local affiliate of Mentor or the Memphis Mentoring Partnership. And over time, over the next four years, really put a lot of energy and attention into the... really strengthening the partnership, working with a number of different organizations to build their capacity, promoting youth mentoring throughout our community, getting additional corporate, civic, and state-based organizations involved with youth mentoring, and really trying to maximize all the resources that you might have with a professional sports franchise to really educate and build awareness for mentoring in our market.

The big growth really took place this past summer when... as we had launched a team up initiative. "Team up, be a mentor" is kind of our mantra and is our campaign now to recruit and refer individuals as service mentors and also to aid mentoring programs with mentor retention. And through the discussions and through our strategic planning sessions, we saw that there was a lot of duplication and a lot of confusion in our marketplace of profession that a lot of people were doing mentoring and not everyone was communicating and we really dedicated ourselves to being a hub for youth mentoring in this area. And among other things, ended up bringing the Memphis Affiliate of Mentors, the Memphis Mentoring Partnership under our umbrella and so now, we not only fully fund that organization but really are trying to grow memberships in the Memphis Mentoring Partnership and offer additional services or resources to existing and emerging mentoring programs.

In addition to this... with this team up campaign or this youth mentoring campaign, we've, through trial and error, have really made a lot of effort to get more people involved and especially increase the number of mentors in this area. We quickly realized that lots of big events aren't necessarily the best tactic to recruit individuals and so we've made great efforts to establish partnerships with lots of different organizations including businesses, education, law enforcement, civic organizations,

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and state-based organizations to varying levels of success but all can serve as pipelines for mentor recruitment and also can connect us and those individual organizations to prospective funders.

It sort of brings us to this point where we're sort of on the threshold of National Mentoring Month, have identified about six or seven different events that will be taking place throughout the month of January but among other things are really looking to how we can best serve not only the agencies that we fund and the programs we fund through the Grizzlies Foundation but also the members of the mentoring partnership.

And this is where I sort of wrap up with some observations and some advice based upon the kind of conversations I've been having with funders in this region. One thing I do want to pass on is that and something to keep in mind is that in this economic climate, a lot of funders are grappling with shrunken assets. A lot of them are seeing losses of 20, 30, sometimes even 35, or 40% of what they typically would be able to allocate for annual grants. With that, they're having to streamline their grant making and really take a much closer look at the organizations that they fund. My advice would be to take the time to track what you're doing and be able to really report on all the fine elements that your mentoring programs contain and so that when you have an opportunity to speak with funders that you can really present a comprehensive picture.

Along that same line, accountability I think is going to be a much higher priority for foundations and all grant makers for that matter. They're really going to want to know that what their dollars are doing and being able to break that down and report that back I think is going to be especially important.

I think it's also important for mentoring programs to give funders opportunities to observe what they're doing. Just because you say you're mentoring doesn't mean they really know what that looks like and every program has a slightly different approach to mentoring and we all have different models and so while we might maintain similar elements, I think it's important for prospective or existing funders to really see for themselves how the mentoring works.

Another point I did want to make is that the one-to-one model can be challenging and of course, when... in our case, when our priority is mentor recruitment, trying to find individuals that serve as one-on-one mentors can be difficult and so now might be a time, too, to reflect on how is that model working for you and is group model or electronic models or other things might be a consideration. Now is the time to look into that and pursue resources to support that.

And finally, another very important point and something that's very... it really is an essential part of how the Grizzlies Foundation is now approaching prospective grants is utilizing the elements of effective practice that Mentor has assembled. Now more than ever, I think organizations are going to be using those resources and thinking seriously what elements or what standards are to be in place in order to ensure that effective mentoring is in place at your organization and I encourage all participants in this call to make the most of those relationships you have with state or local partnerships through Mentor and if you don't have one in your area to contact Mentor

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because they have this tons of toolkit and resources available to you at next to no charge that can really help you streamline what you're doing and ensure that your running effective programs.

I'm happy to take calls at the end. I want to make room for the other speakers but again, thank you.

Roxana Torrico – The Finance Project – Practice Group Director

We're good on time. Jenny, I have a quick question. You mentioned the elements of the effective practice and I think it's going to come up a few times during this call. So can you go over them briefly for those that aren't familiar?

Jenny Koltnow – Memphis Grizzlies Charitable Foundation – Executive Director

Yes. There're really 10 elements of effective practice that have been established and then really refined and strengthened over the last probably 15-20 years through Mentor but they're much evidence-based and supported by tons of research but those elements range from having sufficient screening mechanisms in place at your programs, criminal background checks, fingerprinting and the like, effective training for the mentors, support for the mentors, reasonable practices for evaluating programs for selecting students and measurements. And I think none of them are huge hoops to jump through but all of them are essential to ensuring effective mentoring is taking place. And there is among the programs the Grizzlies Foundation will be hosting in January is actually a workshop for funders in our region to educate them on these elements of effective practice because we feel very strongly that all funders really need to be aware of these elements and so that we can all really support more effective and stronger and sustainable mentoring programs.

Roxana Torrico – The Finance Project – Practice Group Director

Okay. Thank you. What we'll also do for folks is post a link to those elements when we post all of our materials from this call so folks can refer back if they need to. Well, that was great information. I'm sure you'll get tons of questions later from the funder's perspective.

Next, we're going to hear from Carolyn Becic and she is the Executive Director from Oregon Mentors, a statewide partnership for all mentoring programs in Oregon and Southwest Washington. Carolyn is going to talk a little bit about the type of services her organization provides to the mentoring programs in her region and will also discuss some strategies that might be helpful to organizations in raising funds for their programs. So I'm going to turn it over to Carolyn.

Carolyn Becic – Oregon Mentors – Executive Director

Thank you and thanks so much for participating in this conference call.

So I'm going to run over a little bit of Oregon Mentors little background, what we do. I'm going to talk about how we're funded, also about some of the services that we provide mentoring programs around sustainability and fundraising, talk a little bit about specific challenges that we see programs face and some ideas about how to problem

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solve of those challenges and then just again touch back on certain different fundraising strategies.

Oregon Mentors was started eight years ago by CEO level folks who went to the convening of folks in Philadelphia that was the America's promise that Colin Powell pulled together all of the living presidents. And after that conversation about what you'll need to be successful, they came back to Portland and were very jazzed about doing something. They took a year-and-a-half to do a study on how many mentoring program were in Oregon, which at that point was about 100. How many kids were being served? About 10,000. And how many kids needed mentoring? Which was about 100,000. So basically, we are serving 1 in 10 kids. And those folks decided rather than start the 101st mentoring program that what was needed was a partnership to support all 100 mentoring programs. And so that's the history out of which we've grown.

The three things that we talk about, the buckets that we talk about, what we do are voluntary recruiting and referral so our website become referral database for people all over the state and then the recruiting side is around building awareness and trying to connect programs directly with corporations that might help with their recruiting. The second bucket is professional development, which is training and technical assistance. Again, we try to facilitate training opportunities for our mentoring programs and then provide direct training on the elements of effective practice. The technical assistance, as most of you know, is people call you, they have a lot of great questions, they e-mail you questions, and we do those on a one-to-one basis. The third bucket is sort of a catch-on. Its resource delivery and that's everything from providing fingerprinting kits to programs so that they can fingerprint folks to Mentor Pro which is an amazing database that rolled out of Mentor, the National Mentoring Partnership, free tickets to events and specifically Blazer tickets, which I'll talk about a little bit more detail later, those kinds of things that we can get and distribute across the state pretty easily.

So we're funded... our budget, we have four full time FTEs in our big city, Portland, and then one personnel in Southern Oregon and our budget is just shy of \$600,000 and its all private money. We don't have any government support. And because we were started with basically CEO level investors, we've been very fortunate to be able to raise money from corporations and wealthy individuals and foundations. So we have an annual special event. It's our signature event and it raises about \$300,000 and it's a luncheon and it does that because we try to get a \$50,000 sponsor and then a handful of \$25,000 sponsors on down the line and then we auction off time that people can purchase for kids to spend time with well-known Oregonian. So that's the two revenue streams for that event.

We also write a lot of grants to foundations and more recently, have had good success because we're being able to show track record of things that we're delivering to mentoring programs which we did in the early days as well but the more concrete things we can deliver the more likely we have success with the foundation and then we're trying to develop a more rigorous and better outreach to individual donors both through annual appeals and through major gift pledges, getting to know people and

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then asking them to fund our organization. So this year, even though the environment has been bad, we've had a fairly good year and yet we're looking at how we can cut cost for the 2009-2010 fiscal year.

A little bit about the services that we provide mentoring programs that involve fundraising and sustainability. First of all, we know that we can't do all things well and so when we talk about our training, it's around the elements of effective practice. So what we've done is we've taken a portion of the proceeds from our annual event and bought about \$15,000 worth of scholarships for the people who run mentoring programs to go to training provided by an organization called Technical Assistance for Community Services. This is their specialty. They do board development. They do how to have clean financials. They do fundraisings. They do how to have a good IT, how to design your websites. So they do all the nice infrastructure training that programs desperately need but again that we're not qualified to deliver. And that's been very well received from our mentoring programs because they generally don't put a lot of training dollars into their own budget.

The second thing is the technical assistance. So it just so happens that my background is fundraising and I've done it for about 10 years. So I take a lot of calls from people who either want some advice on how to capture a foundation, what their interests are, could we review their grant request, can we talk through their budget with them, who is this donor and what's the best approach for this donor, and that can again be a foundation or corporation or an individual. And so I do spend time doing that with people and I think especially when they're just starting out, it's really helpful.

And then finally, we have provided some grants writing trainings with again local experts, so that's what they do and we do some grant review and editing. And again programs find that very helpful. I think what they sometimes find most helpful is just coming together and talking about the difficulties of fundraising and giving each other tips as well and so many of our sort of month or bi-monthly meetings have that ability for some of sharing of tips of the trade.

So a little bit about specific challenges that I see programs having. One is that oftentimes, at least in Oregon, mentoring programs are housed within a larger social service organization. Oftentimes they started because they got some sort of three-year Federal grant but once those grant monies are gone, they have to advocate very heavily within their organization to get to be sustained. And so some of the advice that I give people is start as soon as you get that Federal grant or your program gets started, you really need to have the ear of the executive director about the importance of your program, you need to be talking and developing relationship with the development director of the organization making sure that they're out there looking for funding for your program, and even, if it's allowed, make sure you have some advocates on the Board of Directors who are advocates of your organization or rather of the mentoring aspect of your organization. So if some of the Board of Directors are actually mentors, they're going to be much more vocal about your program being funded adequately and being able to grow in this larger social service organization because I think again when times are tough, it comes down that we're providing food and clothing and rent assistance and mentoring is really great but you're going to get

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cut if you haven't developed those relationships to sustain yourself. And I know in some organizations it's also frustrating because you can't actually go after money without the permission of a larger organization. So I understand the difficulty in that situation. And at the same time, of course, those larger organizations provide a lot of back office support like finances and being able to buy benefits, healthy benefits, those kinds of things.

The other group we see that's very vulnerable is the organization that's two to three people, maybe their budget is around \$250,000. Everyone is so focused on serving kids and matching mentors that it's really no one's job to fundraise except for perhaps executive director or a part time grant writer and the advice and support that we try to give those people is really to start by building those relationships, by having the strongest board you could possibly have, by building partnerships and finding advocates and making sure that your mentors themselves are good advocates for you.

And the question I often get is, "Well, you're blessed because you were started with CEO level folks, how do I get my foot in the door?" And my answer is really to at least... we only have one huge company here anymore and it's Nike. And it's like, well you need to get that Nike person to volunteer to be a mentor and then oftentimes corporations are much more likely to support a program where their employees are involved so that employee involvement is crucial and then it's just about networking and knocking on doors and it's a bit of a numbers game.

Most corporations have somebody who does community relations and it's their responsibility to meet with you and they talk to you. Foundations I've heard more and more say, "You know what, we can't do our work without you. Come talk to us. Come sit down and explain to us about your program."

I'm going to kind of continue with a couple of sort of fundraising advice and strategies that I see working for us and for others. And I would continue to say about that education piece that foundations want to know more about mentoring, yes, it sort of makes sense to them, but they need to know the research. They need to know if kids are mentored, do their grades go up immediately, or what does the research say about that. And then if your program has a really strong evaluation plan, that's the beauty of it. You can say, "Here's what the research says about mentoring and here is what our programs are doing and here are our outcomes." And I would say that what Jennifer said was spot on and that is that accountability is going to be everything in this climate and strong evaluation is absolutely essential.

And some of the programs that work with us, the most difficult kids in Oregon will say that our outcomes aren't that great, the kids still dropout of high school or they still get pregnant. But you have to sometimes demonstrate it. Here is the trajectory they would be on which is probably incarcerate and here's how our program has helped them stay out of the legal system. Here is how we are helping stop the generational poverty that we so often see. You know, this mother is going to be a much better mother to her child, that kind of thing. If your kids are going on to college and doing amazing things, all the better.

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The second one is thinking creatively about what the corporation or the foundation or the individual wants out of the relationship. So for example, corporate partners, I always come to them with a list of five things that I want to talk with them about. One is employee involvement, the other is their employee giving campaign. Yes, I want them to support our annual event but I also want them to look for opportunities to look like good corporate citizens by joining with us in some sort of advertising campaign or ways that we can tell the communities, "Look at this bank, they're doing great things for the community, they're partnering with us and they're helping kids."

I can't emphasize enough the importance of being opportunistic. I think I drive my staff completely crazy but we had two opportunities come to us last year and their busy with a million things. One was around the Mayor of Portland wanted to get more employees of the city mentoring. So we spent quite a bit of time with them trying to develop a proposal and some sort of track record that other cities are doing about using employees to volunteer. Frankly, it went nowhere. We spent a ton of time on it and it was really frustrating to not necessarily get anything concrete out of that particular effort. The other was we were invited by the Portland Trailblazers to send a proposal to them that would be if we had a spokesperson and one of their lead players, what would we do with that person? So again we sort of dropped everything, wrote this proposal and ended up getting selected as the organization that's partnered with Greg Oden who was the number one draft pick a couple of years ago and already really well loved by Portlanders. And so that particular opportunity has been amazing for us. Not only did he do PSAs for us but his other sponsors like McDonalds and Cricket Wireless have figured out how they, too, can sponsor Oregon Mentors and support us financially and through advertising and awareness building.

So just a couple of examples of even though people always like to have so much on their plate, it's really important to be opportunistic and look for good partnership to always over deliver on your end of the partnership, to realize that you're an educator for a foundation and for corporations about mentoring, and then to have such an amazing evaluation plan and such good key messages that everybody can really buy into what you're delivering to the community.

And my last thing about fundraising is always to lead with what you're doing is helping kids in need and kids in poverty. Your organization doesn't have means but community has its needs and your organization fills those needs.

And that's all I have to say.

Roxana Torrico – The Finance Project – Practice Group Director

That's a lot! That's a lot of great stuff, Carolyn. Thank you. I have a... you mentioned partnerships a lot throughout your piece and I wanted to ask how do you recognize your partners or those that are invested in your program?

Carolyn Betic – Oregon Mentors – Executive Director

Well, the list expensively is on our website. We always make sure our partners are up-to-date and being thanked on our website. We also make sure that our mentoring

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programs thank our corporate partners. We actually do use some ad space in the business journal to thank them for the degrees that they stepped up in supporting our annual luncheon. And then I think part of it is letting them know that you're a resource to talk to their people. So for example, we have some kids who have amazing success stories and one of them just went to a bank and told her success story at their annual conference and everyone was blown away and it made the people who work there feels so good about the fact that they work at a bank that does such great things in the community. But I think looking for inexpensive free ways to say thank you is my best advice.

Roxana Torrico – The Finance Project – Practice Group Director

Okay. I do have one other question and you talked about fundraising events and so we'll have... as you know, there're going to be larger mentoring programs and then you talked about smaller scale programs. What would be from a smaller or, I guess, cheaper way as examples of fundraising events? What would be something that doesn't require a lot of work but could potentially raise money for an organization?

Carolyn Becic – Oregon Mentors – Executive Director

The best fundraising event is one that someone's already doing and they designate you as the people they want to give money to. So again in Portland, the LPGA does a golf tournament and they events (ph) partner with charities and give the charities the money and there's not a lot of effort on the part of the charity. That's ideal. Our luncheon actually only cost about \$15000 to produce and about 8 of that is on the food and then, of course, some AV and some printing costs. On our first year, we try to get everything under it for free and then again in this climate that's probably pretty tough, but if you find the right venue, having a meal with people is really not... it doesn't have to be that expensive. I think producing your own golf tournament or your own auction is extremely staff intensive and I would guard against doing that. And then the same thing with doing a run or some sort of athletic event, really know your cost going into the event. What's it going to take so you don't end up upside down in the event. The other I can say is house parties. Perhaps there is someone on your board would have 25 people over to their home that they would have in a way a barbecue or Christmas party and then the executive director of your organization is there, they get about 10 minutes to talk about the mission of the program. And if they can make an (inaudible) or if the host doesn't come to (inaudible) that, they just educate. But of course, they make sure they know who those people are, they follow up, and then those can turn into individual gift. So I would encourage house parties to be a great way to spread the word, too.

Roxana Torrico – The Finance Project – Practice Group Director

So those are some great examples, thank you.

Next we'll hear from Linda Gorsuch, Vice President of Development of Big Brothers Big Sisters of Central Maryland and the Lower Eastern Shore. Linda will discuss how her organization has been able to generate revenues through a diverse array of financing strategies. So I'm going to turn it over to Linda.

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Linda Gorsuch – Big Brothers Big Sisters of Central Maryland and the Lower Eastern Shore – Vice President of Development

And thank you very much and that thing about going last is that you definitely discover that a lot of the things that you were going to say have already been said. But on the plus side that just shows you how important these things are that were saying, the fact that we have all come up with the same ideas and advice.

First of all, Big Brothers Big Sisters of America has been around for over a hundred years and the agency I'm a part of which is Big Brothers Big Sisters of Central Maryland and the Lower Eastern Shore opened an office in the Baltimore area in 1952, and now we've grown to include the following: Anne Arundel, Baltimore City, Baltimore County, Carroll County, Dorchester, Harford, Howard, Somerset, Wicomico and Worcester County. Big Brothers Big Sisters is committed, of course, to helping children grow up to be confident, competent, caring adults. We specialized in youth and their families in need. The idea is to contribute to brighter futures, better schools, and neighbor communities for all. We do specialize in the one-to-one mentoring, leading the way throughout the communities. Our community one-to-one is the classic program, the one most everybody thinks of, almost everybody thinks of when they see Big Brothers Big Sisters.

We have expanded into other areas to give us a chance for partnership with other organizations. We have our Amachi Big Brothers Big Sisters. This provides one-to-one mentoring, too, but it's for children of prisoners. So anyone that has one or both parents incarcerated and it's done with local phase based organizations. We also have a Bigs in School program for the elementary and middle schools during the school day. And these are opportunities for us to partner then with businesses, universities, and high schools to provide the volunteers. And we have a fairly new program that is a multi-year program, our B for Students. It was designed specifically for Baltimore City High School students and connecting those students with local businesses. We get organizations agree that in their freshmen year, they take on these group of students and they mentor them through graduating. The idea of course is that it broadens their knowledge of the workplace and also does help them to graduate from school.

So our volunteers are not only the structural but they're the spiritual backbone of the organization. They are everyday people and they just want to reach out to help the youth and their families at their most crucial time. And though our Bigs are asked to commit to a year, many stay much longer. But the secret of our success is perpetual case management. And our organization staff of case managers trains volunteers as mentors. They match the appropriate little and they actively support the relationship throughout its duration.

Our messaging has often though been geared toward volunteers only and we have created most of our marketing efforts for recruitment. And a common misconception is that we are a volunteer organization so we don't need funds. And as you all know, we all need funds. In our department, we are charged with raising 2.5 million thereabouts. We have, including myself, three full time people. So we're all working hard. Your chance of surviving successfully troubled financial times increase when

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**Transcript:
The Finance Project
Finding Resources to Support
Mentoring Programs and Services for Youth
December 18, 2008**

you have a diversified portfolio. Now, in our case, this is not true but this year that worked in our favor or is working in our favor. To explain, 69% of our funding this year has come from government foundation and other grants with only 10% from special events, 9% from individual giving, and 12% from corporate giving and grants. So as you can see a decidedly unbalanced portfolio. But it's especially important for our organization right now to find other revenue sources because since we have multiyear government and foundation grants, they are soon coming to an end and so when you have a looming deadline, replacement grants are not always obviously or readily available. A lot of times you have to sit out for one or two years after you've got these. The ones we have are, for those of you that were wondering, our HHS and DOE and then there is an organization that we had a multiyear challenge match grant where any new money that we brought into the organization over a three-year period. But we've only got one more year left on all of these and we pretty much go from 69% of our funding from government and foundation and other grants to FY10 all of a sudden, were only going to have like 15% to 20%. So that's a quite a bit of money to look at replacing. Our first step in changing our strategies was to look at drafting more urgent messaging and has been suggested by Jenny, getting our donors a chance to become more involved with our program by visiting our programs, workshops, and inviting them to outings that the Bigs and Littles go to. And as Carolyn says, letting them know why we should be funded and we are one of the people that do have a great system of measuring our outcome. And that we can show percentage of kids that are less likely to use drugs, the percentage that are less likely to use alcohol, skip school, or even prone to violence. And the other part of that is in drafting the more urgent messaging is that we also now show them where they would be without our help. How many kids typically dropped out, how many teen pregnancies there are, how many end up in jail. So, it's all about making the outcomes all the positives but the messaging more urgent.

In addition, we need to stress an almost equal importance then to the raising of funds as well as the volunteers. We realized that donors, as I mentioned, want to feel that their gift directly impacts the children that are serving, so we started by creating literature and marketing by giving values to things that we do. Even we all know how expensive it is to do the process just to even match up people with background checks and child safety measures and insurance, but then there's things like the workshops and the training and the school programs, et cetera. So targets have also started reconfiguring because it's not just about going for the big gift anymore, more time needs to be spent on cultivating your bread and butter, which are you current and future donors that are often from middle income class persons. With the corporate layoffs, of course, that reduces the amounts of volunteers and funds that we have, so we emphasize more than ever that partnering with us is good business with a good cause, and exactly that was just mentioned. We're not just going to you for money but we're a partner in many things, in getting your employees more involved and helping to create safer communities as well. And keeping in mind that a lot of times you will get smaller, reduced, or even no gifts, but that is no reason not to keep this people on your radar because in a year or 18 months or 24 months, when they are coming out it, you want them to be the first that you think of.

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We have tried several new events and campaigns this year. What I always suggest doing is we're on a fiscal year, so we frontload what I call, we frontload the year, so if something doesn't work out, you still have the next six months to succeed. We put into place a comprehensive donor plan that covers strategies, stewardship, and goals for both individual and in major donors, and for putting together a target list that includes foundations and corporations and individuals, and it's the first of a three-year plan with diversification and to hang out of the economic slump, the ultimate reward. So mostly, this year for us, we are setting the stage for future success, although hopefully we will see some positive results in this fiscal year. That's all.

Roxana Torrico – The Finance Project – Practice Group Director

Well, that's great information. We're going to take a quick break and asked the operator to open up the lines and to give participants the chance to get into the queue to ask questions and while we wait, I'm going ask you a quick question, Linda. You gave great information as well. I wanted to talk a little about the kind of in-kind support your organization receives and if you could give some examples of the

Linda Gorsuch – Big Brothers Big Sisters of Central Maryland and the Lower Eastern Shore – Vice President of Development

Well, for instance, we have everything from our holiday party where we get 700 people, 350 of which are Littles so the idea is to get Bigs and Littles together and the Modell's and MNC Bank every year arrange for us to hold our party for free at the stadium and the Modell's pickup and, that's Art Modell, of course, picks up that tab for the food. We also have another donor that donates tickets to an Orioles game every late spring. So that it's another match activity that people have for the Bigs and Littles, a way for them to do stuff together.

Roxana Torrico – The Finance Project – Practice Group Director

Okay. Those are great. Operator?

Operator

Yes, thank you. At this time, we will be conducting a question and answer session. If you would like to ask a question, please press *1 on your telephone keypad. A confirmation tone will indicate your line is in the question queue. You will be prompted to record your name and company or affiliation. You may press *2 if you would like to remove your question from the queue. For participants using speaker equipment, it may be necessary to pick up your handset before pressing the * keys. Again, if you like to ask a question, please press *1 on you telephone keypad and you will be prompted to record your name and company or affiliation. Please hold while we pool for questions

Roxana Torrico – The Finance Project – Practice Group Director

I did want to mention, I did receive an e-mail asking if this audio conference was going to be posted and just to let everybody know again the link to the audio conference and the transcript will be posted. I will also be posting the elements of effective practice; we seem to be getting some questions about that as well.

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Linda, can you talk while we wait, you also mentioned partnership with businesses and universities. Can you give us an example of how you're able to get your foot in the door and build these relationships?

Linda Gorsuch – Big Brothers Big Sisters of Central Maryland and the Lower Eastern Shore – Vice President of Development

Well, it does help that we have a nationally recognized name, but what we usually do is we looked at the organizations that are interested in making a real president presence in our coverage area. We also look to see ones that have youth-oriented message and also ones that encourage their employees to volunteer. And so what we end up doing is we either find that out through doing research, most of that you can just find on the internet frankly, and also from connections from people and it's usually a safe bet that the major corporations in your area for instance with us under Armour, Frito Lay, PepsiCo that they are most likely going to have some kind of program in place for their employees that they want to encourage them to volunteer.

Roxana Torrico – The Finance Project – Practice Group Director

Those are great tips.

Operator, do we have a question? Okay, we might still be waiting. Somebody did ask or sent a question asking about engaging your board. What do you if you have a weak board, and Carolyn, I think that would be a question for you.

Carolyn Becic – Oregon Mentors – Executive Director

I really believe in board accountability. What I do with my board is I create a spreadsheet where I track how many meetings they attend, what did they give personally, and how much they give professionally through their corporation or business. Whether they do anything extra like chair a subcommittee, whether they mentor a child and I really work with my board chair to hold people accountable. There is no reason to have their name on your letterhead if they are not working for you and I also separate them into three groups. I say there are those who are worker bees and that's great. They are going to help you on the ground doing whatever they can do. There are those who can help you get money because they can open doors for you. There are those who can give money, something pretty significant. And if a board member is a yes in all three columns, that's awesome. But you definitely want to balance a board member so that you have some givers, you have some people who are comfortable fundraising for you, and then worker bees are important, too, but if your board is 90% worker bees, you have a serious problem. And I think it's also important to acknowledge the fact that people when they come to a board meeting want to look across the table to people who are similar to them, and so I often times have recruited board members in batches. So, for example, if you walk into an organization and it has a lot of social workers, teachers, helpers on the board and you are trying to attract business people, go in after maybe four of them and say, well I'm asking these four people to join and then they'll see that their colleagues are also at the table, and then treat them with the utmost respect as far as great meetings, agenda, great supplement on materials, meetings that start on time and end time, are very professionally run, great minutes. I think the organization has to realize that when you start attracting CEO or VP level folks, their expectations of you are going to

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be extremely high as well. So to me, it's always a progress from the founding board who might be just friends and families to the extremely professional boards. It's really going to be a power house to helping your fundraise. And also, when you talk with people and you orient them, be clear. I want you to fundraise for me, are you comfortable and willing to do that? And if they're not, maybe it's not the right time for them to join your board.

Roxana Torrico – The Finance Project – Practice Group Director

That's great advice. Operator, do we have a question on the line?

Operator

Yes, ma'am. Our first question is coming from Irvine Nugent of Renaissance Village. Your line is live.

Irvine Nugent – Renaissance Village

Hi, everyone. Thanks for all the wonderful information. Mine is just a little technical question. I think it was Carolyn from Oregon Mentors, she had mentioned that one of the things that they do is to supplement organizations with some practical advice and then she mentioned an organization which I did not get the full name of and I'm just wondering if you could just give that again and a little more information on that. I think it was like technical assistance for community something?

Carolyn Becic – Oregon Mentors – Executive Director

Community services.

Irvine Nugent – Renaissance Village

Okay.

Carolyn Becic – Oregon Mentors – Executive Director

That's exactly right. Technical Assistance for Community Services has about a 25-year history here in Portland of delivering just great resources for how to run a successful non-profit. Their acronym is TACS and I'm sure their website is easily available if you Google it and there may be similar organizations in other cities.

Irvine Nugent – Renaissance Village

Thanks so much.

Roxana Torrico – The Finance Project – Practice Group Director

Thank you. Is there another question?

Operator

Yes. Our next question is coming from Ron White of Center of Hope.

Ron White – Center of Hope

Yes. You spoke about government grants, the HHS and DOE, but I was wondering if there are foundations that are like on a top 10 list of funding these youth venturing programs?

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Carolyn Becic – Oregon Mentors – Executive Director

Actually, you can get in whatever state you're in, there'll be a listing that you can search and find that top 10 or even top 50 foundations that are in your specific area and you can do searches on youth development also as well. Do you have guide star or charity navigator or any those that you have accessed to? If you do, those are both wonderful engines to search 990s and find out how much specifically a particular foundation gives and who they are giving to.

Ron White – Center of Hope

Thank you.

Roxana Torrico – The Finance Project – Practice Group Director

Thank you.

I did want to plug in right here that about... that your question was about foundations that the publication does highlight over 25 Federal funding sources as well. So I wanted to make sure I pointed that out for folks when you get a chance to read it.

We can probably take one more question and then it looks like we're going to have to conclude this event. Operator, is there another question?

Operator

Yes. We have a question coming from Charlotte Duffy of the Service Center?

Roxana Torrico – The Finance Project – Practice Group Director

Hi, Charlotte?

Charlotte Duffy – Service Center

Hi. How you're doing?

Roxana Torrico – The Finance Project – Practice Group Director

Okay.

Charlotte Duffy – Service Center

Okay. You spoke earlier, I believe it was Jenny with the Grizzlies and you spoke earlier about one-on-one mentoring, also with Big Brothers Big Sisters, we haven't had a lot of positive efforts in that area in finding mentors mainly because of the economy and I'm wondering, what do you think as funders about peer mentoring?

Jenny Koltnow – Memphis Grizzlies Charitable Foundation – Executive Director

I think the jury is out when it comes to peer mentoring and it has to be carefully structured, carefully organized, and with realistic expectations and I think the part of the challenge with peer mentoring, too, is even the duration of the relationships and the expectations are with the pressure is on that sort more that senior peer that is doing the mentoring. In terms of other models, I really think there's a lot to be said for group models and sports teams and programs where an activity is facilitated and so using the arts or some culinary or cooking curriculum or some kind of music or something like, has really pulled people in and retained those mentors. And we

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frankly don't have but a couple of group mentoring opportunities in the Memphis area. That's something that we're really looking into but as we pursued more and more partners and as we worked... I mean it's really hard to recruit mentors, we see that more and more people are saying they want to do it as a group, they want to pair up, they want to do something with three or four people and so, that the time commitment and just the engagement, in general, isn't as intimidating or as intensive.

Roxana Torrico – The Finance Project – Practice Group Director

Thank you, Jenny.

I do want to thank everybody for their questions. For those that we have not had a chance to respond to, I will direct you to the website and I will try to address those that I can. There were some questions about rural areas, I encourage you to visit our website. We have a financing and sustaining out-of-school time programs in rural communities publication that might be helpful to you.

I wanted to thank all of the speakers and the participants who joined us today. I think we had a great discussion. I'd also like to thank Bill Schmid who is a Program Assistant with The Finance Project for coordinating this event and the Underage Tobacco Prevention, Philip Morris USA and Altria Company for enabling us to host this audio conference.

I'd also like to ask everyone to please help us do our job better by filling out the evaluation form that will be e-mailed to you and that can also be found on our webpage. There is a lot of interest in this field, so I encourage you to tell you colleagues that this audio conference will be posted on our website and they can read the transcript as well. We'll try to expedite that and have that posted by the beginning of next week. But thank you to everyone and I hope that everybody has a happy holidays.

Jenny Koltnow – Memphis Grizzlies Charitable Foundation – Executive Director

Great, thank you.

Carolyn Becic – Oregon Mentors – Executive Director

Thank you.

Linda Gorsuch – Big Brothers Big Sisters of Central Maryland and the Lower Eastern Shore – Vice President of Development

Thank you.

Roxana Torrico – The Finance Project – Practice Group Director

Thanks, everybody.

Operator

Thank you, ladies and gentlemen. This does conclude today's teleconference. You may disconnect your lines at this time. Thank you and have a lovely day.

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