



In this workbook

Choose to participate

Explore your values

Research and focus

Select final grantee(s)

Your Birthday Project Workbook (Donor Edition)

(Your name)

(Year of project)

(Your Mentor's Name)

(Your Mentor's phone number)

(Your Mentor's email address)

"It is more difficult to give money away intelligently than it is to earn it in the first place."

Andrew Carnegie

*The Donor's Birthday
Project Workbook is
sponsored by*

VALENTINE FUNDING SOCIAL
FOUNDATION CHANGE FOR
WOMEN & GIRLS



What is in this Workbook?

The Donor Birthday Project Workbook describes a step-by-step process for you to use to select organizations (“grantees”) to receive the donations aligned to your Mentor’s criteria.

Inside this Workbook you will find:

- A “recipe” for each stage of the selection process
- Checklists and worksheets to aid your decision
- Opportunities for reflection
- Tips and suggestions for researching prospective grantees

Who is this workbook for?

This workbook is for you if you want to:

- participate in a mentor/donor giving project
- experience the joy of philanthropy
- have the opportunity to donate money to organizations of your choice, even if you do not have the funds to do this

How to use this workbook

The Workbook is divided into Sections. Each section is **color-coded** and designed to include everything you’ll need to successfully complete that phase of the Birthday Project.

The sections include:

- Objectives, Ingredients, and Instructions for that phase
- Exercises, Worksheets, and Checklists to help you explore your own philanthropic values and narrow down your list of prospective grantees
- Links to resources, articles, and ideas
- A glossary of terms used in that phase of giving
- Opportunities for reflection

If you are using this Workbook online, the Bookmarks on the left and the boxes on the right will help you easily get to each section.

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Navigation Tips for this Workbook.

There are links throughout the Workbook to help you get from one part of the book to another:

- Click on the colored squares on each page to get to the corresponding section.
- Click on the text underlined in blue to access resources and worksheets outside of this workbook.

You can also click the bookmarks on the left to navigate.



Choose to Participate

Objectives

In this phase of the Birthday Project you agree to participate as a donor. By the end of this phase, you will understand your role in the Birthday Project

Ingredients

- Invitation to participate attend the Kickoff Meeting for the Birthday Project
- Timeline and deadline for the project
- Your mentor’s criteria for giving
- Your giving amount
- Donor’s Starting Sheet
- The Mentor/Donor Agreement Form

Glossary

Mentor	Your mentor is the person who selected you to participate as a donor in his or her Birthday Project. Your mentor will oversee your participation, provide coaching and assistance, and help you to reach your goal of selecting a grantee to receive your Mentor’s funds.
Criteria for giving	Your mentor has identified the amount of money you will be donating and a general guideline for the types of grantees you can donate to. It is important for you to stay within these criteria when you select your final grantee(s).
Your giving amount	This is the amount of money you will be donating to your designated grantee(s).
Grantee	The charitable organization that is the recipient of the money provided by your mentor.
Kickoff meeting	Generally a face-to-face meeting where all participants in the Birthday Project meet for the first time to learn about the project.
Mentor/Donor Agreement Form	This agreement form describes the purpose of the Birthday Project, indicates when the project will begin and end, and asks you to agree to participate, commit your time and effort, and meet the terms of the agreement. The Agreement Form is likely to be an informal document and has no legal bearing. It is an agreement between you and your mentor to jointly participate in the mentor-donor giving project.
Donor’s Starting Sheet	A worksheet that includes all of the information you’ll need to start participating in the Birthday Project.



Instructions

1. Accept the **invitation** to attend the Kickoff Meeting to learn more about your mentor's Birthday Project.
2. **Attend** the Kickoff Meeting, meet the other donors, learn about your role, the time commitment, the project deadline, and your mentor's criteria for giving
 - The Kickoff Meeting is also a great place and time to ask any questions you have regarding the Birthday Project.
3. Complete the **Donor's Starting Sheet** (below) to be sure you understand what your Birthday Project is all about.
4. Read and sign the **Mentor/Donor Agreement Form** (below).

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Donor's Starting Sheet

My Mentor's Birthday Project Vision Statement

The timeline for my project (dates):

Kickoff Meeting	Mid-point check-in	Lists of prospective grantees due	Final grantees identified	Funds distributed	Celebration

My Mentor's Criteria for Giving

Overall amount being donated:

Amount I am designated to donate:

My Mentor's contact information:

Name	Phone	Email



The Mentor/Donor Agreement Form

Name of Mentor:

Name of Donor:

Project Start Date:

Anticipated Project End Date:

The purpose of this project is to provide an opportunity for the donor to learn the process of philanthropy, using the mentor's experience and funds.

We voluntarily enter into a mentor-donor relationship, which we expect to benefit both of us. We want this to be a rich and rewarding experience and thus in order to minimize misunderstanding we agree to the following features of our relationship:

The Mentor will:	The Donor will:
<ul style="list-style-type: none"> Maintain confidential personal information shared Commit to actively participate in the project during the specified start and end dates 	<ul style="list-style-type: none"> Maintain confidential personal information shared Commit to actively participate in the project during the specified start and end dates
<ul style="list-style-type: none"> Establish the giving criteria 	<ul style="list-style-type: none"> Select grantees that meet my Mentor's giving criteria
<ul style="list-style-type: none"> Guide, encourage, and motivate my donor through the philanthropic process 	<ul style="list-style-type: none"> Be receptive to the advice and counsel of my mentor
<ul style="list-style-type: none"> Assist my donor in identifying his or her philanthropic values 	<ul style="list-style-type: none"> Inform my mentor of the types of organizations and values that interest me
<ul style="list-style-type: none"> Maintain at least monthly contact with my donor 	<ul style="list-style-type: none"> Maintain at least monthly contact with my mentor
<ul style="list-style-type: none"> Inform my donor of any potential conflicts of interest 	<ul style="list-style-type: none"> Inform my mentor of any possible conflicts of interest
<ul style="list-style-type: none"> Provide clear expectations and directions regarding grantee selection and the types of forms, letters, and other materials required to make the gift. 	<ul style="list-style-type: none"> Complete and obtain the grantee-related forms and materials required for this project
<ul style="list-style-type: none"> Notify my donor if I am unable to complete the project 	<ul style="list-style-type: none"> Notify my mentor if I am unable to complete the project

I freely agree to participate in this Mentor/Donor project. I understand that this agreement may be terminated by either party if either are unable to complete the project or accept the responsibilities stated above.

Mentor signature

Donor signature

Date

Date



Reflections on Choosing to Participate

Congratulations! You've started your part of the Birthday Project!

Take a few minutes to reflect on how you feel about this.

1. *Why do you want to participate in a Birthday Project? What about the mentor/donor giving model appeals to you?*

2. *What do you hope will happen at the end of your Birthday Project?*

3. *What big changes in the world, in your life, in the lives of your grantees do you hope will occur because of your project?*



Explore Your Values

Objectives

In this phase of the Birthday Project you explore your own philanthropic values.

Ingredients

The Vision and Values exercise
Indicators of Your Values exercise
Gratitude exercise
Giving Intention exercise

Glossary

Philanthropy

The simplest definition is that philanthropy is giving time, talent, and/or treasure for the common good.

Philanthropic values

Your values and beliefs regarding who, or for what purposes, you would want to give your time, talent, and/or treasure to.

Instructions

1. What types of organizations, programs, or individuals do you want to support? To identify your own philanthropic values, completing the following exercises, provided by Inspired Philanthropy:
 - a. Vision and Values exercise
<http://www.inspiredphilanthropy.org/pdf/VisionandValues.pdf>
 - b. Indicators of your values exercise
<http://www.inspiredphilanthropy.org/pdf/IndicatorsofYourValues.pdf>
 - c. Gratitude exercise
<http://www.inspiredphilanthropy.org/pdf/Gratitude.pdf>
 - d. Giving intention worksheet
<http://www.inspiredphilanthropy.org/pdf/GivingIntention.pdf>



Resources

To learn more about philanthropy, take a look at the following resources:

- A curriculum on philanthropy:
<http://learningtogive.org/lessons/unit213/lesson1.html>
- The Chronicle of Philanthropy:
<http://philanthropy.com/section/Home/172>
- Center for Strategic Philanthropy and Civil Society at Duke University
<http://cspcs.sanford.duke.edu/>
- Philanthropy UK: Inspired Giving
<http://www.philanthropyuk.org/Home>
- Inspired Philanthropy
<http://www.inspiredphilanthropy.org/>
- The Center for Effective Philanthropy
<http://www.effectivephilanthropy.org/index.php>



Reflections on Exploring Your Values

Congratulations! You've identified your philanthropic values.

Take a few minutes to reflect on how you feel about this. Were you surprised by any of the values you identified? What do you already do that is in line with your values? What else could you do? Do you have any ideas yet on which organizations, programs, or individuals you might want to fund?



Research and Focus on Prospective Grantees

Objectives

In this phase of the Birthday Project you will identify a list of 1 – 5 prospective grantees that meet your mentor’s criteria for giving as well as your own philanthropic values.

Ingredients

- Mission Matching exercise
- Characteristics of the Groups You Support worksheet
- Imagining a Better World exercise
- Million Dollar Visioning exercise
- Steps for Building a Comprehensive Giving Strategy exercise
- Evaluating a Group for Possible Funding exercise
- Resources for locating non-profit organizations
- Prospective Grantee Form
- Conflict of Interest Form

Glossary

Non-profit organization (NPO)	<p>An organization that does not distribute its surplus funds to owners or shareholders, but instead uses them to help pursue its goals. Examples of NPOs include charities (i.e. charitable organizations), trade unions, and public arts organizations.</p> <p>As a donor, you will be expected to select grantees who are not only non-profit organizations, but who have been identified as tax exempt, charitable organizations by the U.S. Internal Revenue Service. These organizations will have applied for and been granted 501(c)(3) status by the IRS and will have a letter that proves that they qualify.</p>
Grantmakers	Individuals or organizations who use an organized approach (application, criteria) to donate funds to non-profit organizations
Conflict of interest	<p>A conflict of interest exists if an individual or organization is involved with multiple organizations, one or more of which might possibly be in conflict with the motivation of another.</p> <p>For the Birthday Project, an example of a potential conflict of interest is an organization where another donor or the mentor is an employee or on the Board of Trustees. Check with your Mentor on the conflict of interest compliance policy.</p>



Instructions

1. It's now time for you to **identify a list of prospective grantees**. To do this, you need to find organizations or individuals who meet your Mentor's criteria for giving, along with your own philanthropic values.
2. It is a daunting task to narrow down your list of prospective grantees. And sometimes it is difficult to find an organization that matches both your mentor's criteria and your own. Talk with your Mentor about the types of organizations you are interested in. He or she will be able to offer guidance to you and might be able to locate organizations that meet your stated criteria.
3. The following exercises and worksheets from [Inspired Philanthropy](#) might help you to define the types of organizations, programs, or individuals you would like to fund.
 - a. [Mission Matching](#) exercise
 - b. [Characteristics of the Groups You Support](#) worksheet
 - c. [Imagining a Better World](#) exercise
 - d. [Million Dollar Visioning](#) exercise
 - e. [Steps for Building a Comprehensive Giving Strategy](#) exercise
 - f. [Evaluating a Group for Possible Funding](#) exercise
4. The list of **Resources** for this section provides you with ways to locate non-profit organizations.
5. Other good ways of finding organizations you might want to fund are:
 - Articles you read in the news – newspaper, radio, blogs, websites, etc.
 - Organizations with whom you have personal experience
 - Ask your friends, family, and colleagues about the organizations with whom they have experience
 - Organizations who do work in your community
6. To help your Mentor ensure that there are no conflicts of interest between your own employment and volunteer associations and those of your prospective grantees (or other donors' prospective grantees), complete the **Conflict of Interest Form** (below) and send this to your Mentor.
7. When you have your list, complete the **Prospective Grantee Form** (below) and send this to your Mentor.



Resources

The following organizations and websites provide information on non-profit organizations who are interested in receiving charitable donations:

- a. **Better Business Bureau for Charities and Donors**
<http://www.bbb.org/us/charity/>
- b. **Charity Navigator** <http://www.charitynavigator.org/>
- c. **Guidestar** <http://www2.guidestar.org/>
- d. **Delaware Valley Grantmakers** <http://www.dvg.org/> Delaware Valley Grantmakers (DVG), the region's forum for philanthropy, serves as a network, resource and voice to help philanthropy strengthen and improve the health and vitality of our communities.
- e. **Idealist.org** <http://www.idealist.org/> Idealist is an interactive site where people and organizations can exchange resources and ideas, locate opportunities and supporters, and take steps toward building a world where all people can lead free and dignified lives.
- f. **The Foundation Center**
<http://foundationcenter.org/getstarted/askus/> the Foundation Center is a national nonprofit service organization recognized as the nation's leading authority on organized philanthropy, connecting nonprofits and the grantmakers supporting them to tools they can use and information they can trust.



Conflict of Interest Form

Your Name:

Current Professional Activity/Employer (if applicable):

Professional Activity or Employer Name	Address

Current Professional Memberships / Board Memberships / Community Involvement or Other Service *(please list and describe nature of involvement, i.e. Board Member, Volunteer, Advisory Board Member, etc.)*

Organization (name and address)	Nature of your involvement	Notes or Comments

My signature attests that I have carefully read the Conflict of Interest Policy and commit to abiding by all policies and procedures addressed in the Policy. I further commit to advising my Mentor of any changes in my activity(s) that have, or appear to have, impact on my adherence to this policy.

Signature:

Date:



Prospective Grantee Form

The grantees you list on this form do not have to be your final choices, and you can have several at this time, but your Mentor needs a list from you so he or she can check for conflicts of interest.

Prospective Grantee Name	Address or Website	Meets Mentor's Criteria for Giving (Yes/No)	Which of your own values does this prospective grantee meet?



Reflections on Researching and Focusing on Prospective Grantees

Congratulations! You've identified a list of prospective grantees. Well done!

Take a few minutes to reflect on how you feel about this. Do the organizations on your list excite you? What do you hope your funds will be used for?



Select Your Final Grantee(s)

Objectives

In this final phase of the Birthday Project you will select the final number of grantees specified by your Mentor.

Ingredients

Preparing for Site Visits worksheet

Results and Impact worksheet

Birthday Project Grantee Nomination Form

Glossary

Site Visit	An actual visit to an organization to determine specific information about the organization. A site visit enables you to see the organization's building (if they have one), observe the programs in action, meet the executives and staff members, and talk with them about their work and their organization.
Project or Program Funds	These are funds used to ensure the ongoing functioning of a specific initiative within the organization. Most non-profit organizations conduct numerous programs each year and many of these only exist if the organization receives funds that are designated for those programs.
General Operating Funds	These are funds used to ensure the continuing operation of the organization. These funds might be used for salaries, rent, equipment and supplies, or employee training.
Organizational Focus	The organizational focus is the type of population or issues the organization mainly addresses.
Executive Director	The individual who is paid by the non-profit organization to oversee the operations and strategic direction of the organization. In for-profit companies, this would be the Chief Executive Officer.
Program Manager	The employee of the organization who has responsibility for overseeing and managing a specific program that the organization sponsors.
IRS 501(c)(3) determination letter	The letter from the U. S. Internal Revenue Service that proves that the organization has applied for and been approved as a legitimate, active non-profit organization.



Instructions

1. Review the **Birthday Project Grantee Nomination Form** (below) with each of your prospective grantees to learn more about their organizations. Generally, the executive director or a program manager at the organization will be happy to talk with you about these questions.
2. In order to fully assess an organization you are considering for funding, it is important to perform a **Site Visit**.
 - a. Make an appointment to visit the prospective grantee's location.
 - b. Complete the [Preparing for Site Visits](#) worksheet.
3. The [Results and Impact](#) worksheet might give you some additional questions you might want to ask yourself and the organization to help you decide on your final list of grantees.
4. Discuss your thoughts about finalizing your decision with your **Mentor**. He or she will ask you some questions to help you make your decision.
5. Complete the **Birthday Project Grantee Nomination Form** (below) for each of your final grantees and submit this form to your Mentor.
6. **Celebrate!!** You've reached the end of your tasks for the Birthday Project. Your mentor will distribute the funds and congratulate you on your achievement.



The Birthday Project Grantee Nomination Form

Name of Proposing Donor

Name of Mentor

I. Mentor's criteria for giving:

Does this organization meet 100% of the Mentor's criteria for giving?

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
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II. Donor's identified philanthropic values:

Does this organization or program meet at least 80% of the Donor's values?

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
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III. Applicant/Organization Information:

Name & address:

Project name (if applicable and different from organization name):

Contact name and telephone/fax:

E-mail address:

Web address

Agency Budget:

Year Agency founded:



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Mission of Organization:

Major Agency Funding Sources:

**Please attach a copy of the organization's IRS 501(c)(3) determination letter.



IV. For Applicants Requesting Project/Program Funds:

Project/Program Information:

Description of project/program:

Project Budget:

Any additional comments:

V. For Applicants Requesting General Operating Funds:

Organization Information

(see above for organization mission)

(see above for agency budget)

Any additional comments:



VI. Organizational Focus

Which category(s) best describe the **focus** of the organization and/or proposal:

Place an "x" in the box next to all that apply	Focus
<input type="checkbox"/>	Anti-violence
<input type="checkbox"/>	Arts
<input type="checkbox"/>	Civil rights
<input type="checkbox"/>	Community development
<input type="checkbox"/>	Domestic violence
<input type="checkbox"/>	Economic development
<input type="checkbox"/>	Education
<input type="checkbox"/>	Environment
<input type="checkbox"/>	Family support
<input type="checkbox"/>	Health and well-being
<input type="checkbox"/>	Housing
<input type="checkbox"/>	Political advocacy
<input type="checkbox"/>	Reproductive rights
<input type="checkbox"/>	Self-esteem/personal empowerment
<input type="checkbox"/>	Other (Please specify)



VII. Please estimate the following characteristics:

- a. **Age groups(s)** the organization serves if applying for general operating funds **OR** if for project/program then based on who will be served by the grant:

Place an "x" in the box next to all that apply	Age group
	Girls (age 0 - 11)
	Boys (age 0 - 11)
	Adolescents (age 12 - 18)
	Young women (age 19 - 25)
	Young men (age 19 - 25)
	Adult women (age 26 - 64)
	Adult men (age 26 - 64)
	Senior women (age 65+)
	Senior men (age 65+)

b. **Fiscal Year information**

Estimated number of individuals your organization will serve this fiscal year or program year if applying for general operating funds OR if for project/program then based on who will be served by the grant:	
Starting month/year of your Fiscal Year:	
Ending month/year	



- c. **Population(s)** your organization will serve this fiscal year or program year if applying for general operating funds **OR** if for project/program then based on who will be served by the grant:

Indicate percentage	Population
%	African/African-American/Caribbean
%	Asian/Asian-American
%	Hispanic/Latino
%	White
%	Native American
%	Multi-ethnic/Other
%	U.S. born
%	Non-U.S. born

- d. **Income level** of those served by your organization in this fiscal year or program year if applying for general operating funds **OR** if for project/program then based on who will be served by the grant:

Indicate percentage	Income level
%	Low income
%	Middle income
%	Upper income



Reflections on Selecting Your Final Grantee(s)

Congratulations! You've selected your final grantee(s) and these organizations, programs, or individuals will be receiving the funding you designated.

1. Why did you select this particular grantee to receive your donation?	
2. How did the site visit go? What did you learn that you didn't know before the visit?	
3. What do you hope your donation will be used for?	
4. Did your feelings about this organization change over time?	
5. Did you know about this grantee before you began the Birthday Project?	
6. Do you think of yourself as a philanthropist now?	
7. How do you think your own philanthropic activities will change due to the Birthday Project?	

Thank you for participating in the Valentine Foundation's Mentor/Donor Giving Model: A Birthday Project.