



Your Birthday Project Workbook (Mentor Edition)

(Your name)

(Year of project)

(Your Valentine Foundation Mentor's Name)

(Your Valentine Foundation Mentor's phone number)

(Your Valentine Foundation Mentor's email address)

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

*"You can have everything in life that
you want if you will just help enough
other people get what they want."*

Zig Ziglar



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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 page numbers in the Table of Contents to go to that page.
- Click on the colored squares on each page to get to the corresponding section.
- Click on the text underlined in blue to get to the Appendix samples and back to the corresponding section.



What is in this Workbook?

The Mentor Birthday Project Workbook describes a step-by-step process for mentors to use to create, manage, and complete a mentor/donor giving project.

Inside this Workbook you will find:

- A "recipe" for creating a successful project, including ingredients and instructions
- Checklists and worksheets to aid your planning
- Opportunities for reflection
- Tips and suggestions for coaching, motivating, and inspiring your donors
- Ideas for celebrating the success of your project.

Who is this workbook for?

- Individuals or organizations who want to use a mentor/donor giving model of philanthropy
- Individuals or organizations who want to learn how to replicate Phoebe Valentine's initial success at helping others to become philanthropists
- Individuals or organizations who want to motivate others to consider the larger world
- Individuals or organizations who want to expand their reach and impact

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 – You will recognize these by their **bold colors** in the instructions
- Links to Samples from the Valentine Foundation's Anniversary Project, a modified Birthday Project. The samples are in the [Appendix](#).
- Links to external websites for articles and ideas

If you are using this Workbook online, clicking on the colored squares on the right will bring you to those sections.



Start your Birthday Project

Objectives

In this phase of the Birthday Project you will write your vision statement, create a timeline for your project, establish your criteria for giving and decide on the amount of money you want to give (total and by donor).

Ingredients

Your vision
Timeline and deadline for the project
Your criteria for giving
Your giving amount
A budget for the project
A committee (optional)
Your Valentine Foundation Mentor

Instructions

1. Complete the **Develop a Birthday Project Vision Statement** exercise. Think of your vision as an “elevator speech” – something you can communicate quickly that has punch. A [Sample Elevator Speech](#) is available in the Appendix.
2. Create a tentative **timeline** and **deadline** for your project. You might need to adjust the timeline later, given everyone’s schedules and commitments. The **Starting Sheet** includes one with the basic milestones.
3. Establish your **criteria for giving**. What types of organizations do you want to support? Not sure, try completing the Vision and Values worksheets (in the Portfolio) or the [Evaluating a Group for Possible Funding](#) worksheet to guide you.
NOTE: If you want your gifts to be tax deductible, your donors must select organizations that have obtained 501(c)(3) status from the U.S. Internal Revenue Service. Organizations that have 501(c)(3) exempt status can provide your donor with a copy of their eligibility letter from the IRS.
4. Decide how much you want to donate, overall. Decide how much you want each donor to be responsible for donating. Write these amounts on the **Starting Sheet**.
5. Decide on your **budget** and enter this in the **Starting Sheet**. How much money you are willing to spend on the Birthday Project, aside from the money you will donate?



The kinds of costs you might incur are:

- Kickoff party - food, decorations, invitations, space rental, supplies
- Closing/celebration party - food, decorations, invitations, space rental, supplies
- Telephone costs when contacting donors
- Mailing costs
- Website development costs – for updating your site to include your Birthday Project

6. You might want to have a **committee** help you manage your Birthday Project. Or even a team of mentors. A [Sample set of Committee Roles and Responsibilities](#) as well as a [Sample First Meeting Agenda](#) are available in the Appendix area.
7. When you downloaded the Mentor Birthday Project Workbook, the Valentine Foundation assigned a **mentor** to you to help you with your project. You can contact your Valentine Foundation mentor at anytime, but it's a good idea to check in at the end of each phase of the project.



Develop a Birthday Project Vision Statement

Crafting a vision can appear daunting in the beginning. You might be asking yourself "Who am I to have a vision? How will I know if I've written the 'right' vision statement? What DO I hope to accomplish?"

Actually writing a vision statement isn't all that difficult, though. Just think about these 3 questions:

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

(Insert your answer here.)

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

(Insert your answer here.)

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

(Insert your answer here.)

Ready? Write your vision statement for your Birthday Project on the next page.



Starting Sheet

Write your Birthday Project Vision Statement here:

The timeline for my project (enter the dates for each phase):

Start date	Select Donors	Kickoff Meeting	Mid-point check-in	Lists of prospective grantees due	Final grantees identified	Make the gift and complete the project	Celebration

Enter your criteria for giving here. Reminder: if you want your gifts to be tax deductible, the organizations your donors select must have 501(c)(3) status.

1.
2.
3.
4.

Overall amount to donate = \$

Amount allocated for each donor to donate: \$

Overall Project Budget:

My Valentine Foundation Mentor's contact information:

Mentor's Name	Phone	Email



Reflections on Starting Your Project

Congratulations! You've started your Birthday Project!!

Take a few minutes to reflect on how you feel about this. And don't forget to breathe!



Select the Donors

Objectives

In this phase of the Birthday Project you decide who your donors will be and invite them to a kickoff-meeting.

Ingredients

Your list of prospective donors
Date, time, and location of your kickoff meeting
An invitation to attend the kickoff meeting
Valentine Foundation Check-in

Instructions

1. Think about who you'd like your donor(s) to be. Who would you like to mentor? Complete the **"Who Do I Want to Mentor? Worksheet"**. Decide how many donors you want to include. Have a few alternative choices, too, in case someone isn't able to participate. A sample [Donor nomination form](#) is available, too, in the Appendix area. Enter the names of your list of donors on the **Donor Selection Sheet**.
2. Set a date, time, and location for the meeting that will initiate your project. This "kickoff" meeting is when you will meet your donors, communicate your vision, criteria for giving, and the amount the donors will be donating. Enter your meeting details on the **Donor Selection Sheet**.
3. Make it fun! You're conducting a Birthday Project to celebrate or honor an occasion, so start out with a party. (And, of course, you'll end with one, too!) Here's a good [party planning checklist](#).
4. Create an invitation to invite the donors to attend. This can be a simple letter or email, an electronic invitation, more formal, or more creative. It's up to you. A [Sample Invitation](#) is included in the Appendix.
5. Contact your Valentine Foundation Mentor to review your Donor Selection Sheet. She'll offer guidance and suggestions if you need these, and congratulate you on completing the donor selection phase.



Who Do I Want to Mentor? Worksheet

There is no right way to select your donors. There are no perfect donors. And you can select as many donors as you like (though keep in mind that you will be spending a lot of time mentoring each of them).

Who you select will be determined by who you want to spend some time with, working on a something you've probably never done before.

There are really only 5 "must have" criteria for identifying your donors. Your donor(s) should be:

- Someone you trust, since you'll be asking him or her to donate funds on your behalf
- Someone you will enjoy getting to know better
- Someone who is available and able to commit to your project
- Someone who will honor your criteria for giving and your vision
- Someone you think you'd like to coach, motivate, or inspire

List of possible donors:

Prospective Donor's Name	Contact Information	Reasons to include	Your Concerns	Invite to be a donor? Yes/No



Donor Selection Sheet

My Selected donors:

Prospective Donor's Name	Contact Information	Date Invitation Sent

My Alternate donors:

Alternate Donor's Name	Contact Information	Date Invitation Sent

My Birthday Project Kickoff meeting details:

Location of meeting:	
Date:	
Time:	
Date invitations will go out:	



Reflections on Selecting Your Donors

Congratulations! You've selected your donors!

Take a few minutes to reflect on how you feel about this. Are you excited? Nervous? Relaxed?



Project Kickoff

Objectives

In this phase of the Birthday Project you will explain the project to your donors and provide them with the information they need to begin their part of the project.

Ingredients

Kickoff planning sheet
Donor Birthday Project Workbook for each donor
Copies of your timeline, vision, criteria for giving, and the donation amounts
Mentor/Donor Agreement Form
Contact list for you and the donors

Instructions

1. Review the **Kickoff Planning Sheet** to be sure you have everything you need for the Kickoff Meeting.
2. Provide a link to the Donor Birthday Project Workbook or print a copy for each of your donors
3. Make copies of your vision statement, timeline, and giving criteria.
4. Make copies of the Mentor/Donor Agreement Form
5. Arrange for or prepare food, plates, etc. (Maybe a Birthday theme?)
6. Create name tags if the donors don't know each other. You can purchase name tags, or create something related to your Birthday Project.
7. At the Kickoff:
 - a. Welcome the donors
 - b. Explain how/why you selected them
 - c. Have the donors introduce themselves to each other.
 - d. Consider playing a [teambuilding game](#) to help the donors become more comfortable with each other.



Kickoff Planning Worksheet

Do you have all of these items available?	
<input type="checkbox"/>	Donor Workbooks for each donor
<input type="checkbox"/>	Purpose of my Birthday Project
<input type="checkbox"/>	My vision statement
<input type="checkbox"/>	My giving criteria
<input type="checkbox"/>	Overall donation amount, and amount each donor is allocated
<input type="checkbox"/>	Project timeline for each donor
<input type="checkbox"/>	Mentor/Donor Agreement form for each donor
<input type="checkbox"/>	Contact list of you and all donors
<input type="checkbox"/>	Food, decorations



Mentor/Donor Agreement Form

<i>Name of Mentor:</i>	
<i>Name of Donor:</i>	
<i>Project Start Date:</i>	
<i>Anticipated Project End Date</i>	

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:

<i>The Mentor will:</i>	<i>The Donor will:</i>
<ul style="list-style-type: none"> Maintain confidential personal information shared 	<ul style="list-style-type: none"> Maintain confidential personal information shared
<ul style="list-style-type: none"> Commit to actively participate in the project during the specified start and end dates 	<ul style="list-style-type: none"> 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.

<i>Mentor signature</i>	<i>Donor signature</i>
<i>Date</i>	<i>Date</i>



Reflections on Kicking Off Your Project

Congratulations! You've kicked off your project and your donors are starting their research!

Take a few minutes to reflect on how you feel about this. Have some extra birthday cake. The first hard part is done.

Check in with your Valentine Foundation Mentor.



Coach and Motivate Your Donors

Objectives

In this phase of the Birthday Project your purpose is to connect with your donors to see how they're doing, help them if they are off track, and learn about their process.

Ingredients

Mentoring Article

Initial interview questions to ask your donor

Midpoint questions to ask your donors

Request for list of prospective grantees

Instructions

1. Read the article (below) on Mentoring. How are you doing so far? Is there anything you'd like to change about how you are mentoring?
2. Connect with each of your donors at least 3 times during the project, especially if they haven't contacted you.
3. Use the **Initial Donor Interview Questions worksheet** for your first check-in to see how their research is going and whether the project is going as they expected.
4. Use the **Midpoint Questions to Ask Your Donors worksheet** as a guide for your second check-in.
5. For the third check-in, send a request to your donors asking them to provide you with their list of prospective grantees. There should be between 1 – 5 prospective grantees per mentor. A [Sample Request](#) form is in the Appendix.
6. If your organization does not already have a Conflict of Interest Compliance Policy, you might consider creating one to handle any prospective conflicts of interest between your donor(s) and the prospective grantees. (Contact the Valentine Foundation for suggestions on how to create and apply a Conflict of Interest policy.)



Mentoring Article

MENTORING

Adapted from: Becoming a Mentor - Lead - Workforce Development - ATTC Network. (n.d.). *Welcome to the ATTC Network*. Retrieved November 6, 2010, from <http://www.nattc.org/explore/priorityareas/wfd/lead/becomeamentor.asp>

Mentoring: Pairing of a more skilled and/or experienced person with a lesser skilled and/or experienced person with demonstrated potential.

Mentoring links emerging and future leaders with experienced professionals for career development. An established leader can facilitate personal and professional growth by sharing knowledge and insights gathered through the years with an emerging leader. Mentoring also provides opportunities for both parties and can facilitate the expansion of each other's leadership skills.

A mentor's job is to help an emerging leader clarify individual goals and provide guidance in professional leadership development. In addition, mentors should inspire and motivate their protégés. This process should prepare emerging leaders for successful leadership positions in the future.

Teacher

- Answers emerging leader's questions and steers her to other sources when necessary
- Shares wisdom of past experiences
- Provides candid feedback about perceived strengths and developmental needs

Guide

- Assists in the development of the emerging leader's individual leadership development plan and professional goals
- Highlights and shares leadership development and career opportunities
- Offers advice on real or perceived roadblocks to effective leadership

Motivator/Coach

- Provides encouragement and support
- Provides positive feedback
- Establishes an open and trusting relationship

Sponsor

- Links the protégé with others who can enhance the learning experience
- Provides an opportunity for exposure when appropriate



Benefits of Mentoring for Established Leaders

- Mentoring serves as a link to the front line. It provides important feedback and offers perspective regarding the views of people serving at different levels in the field.
- Mentoring strengthens one's own skills and leadership growth while challenging and coaching an emerging leader.
- Mentoring can help develop many rewarding professional relationships and contacts.
- Mentoring is a source of recognition and respect within the field.
- Mentoring gives the established leader a sense of contribution to the field and is an opportunity to pass on a legacy to the next generation of leaders.

Signs of a Successful Mentoring Relationship

- The protégé or emerging leader is open to change and transition, exploring possibilities, helping others and learning from others.
- The mentor and emerging leader are both inspired by the relationship and gain a great deal of satisfaction from the partnership.
- The mentor and emerging leader are both committed to understanding, growing, confronting and solving problems.
- The emerging leader is connecting with the mentor and views the relationship as one of value in which mutual interest, respect, and straightforward communication are constants.
- The emerging leader is comfortable seeking the mentor's counsel and support.
- The emerging leader takes responsibility for meeting his/her own needs in the relationship.
- The mentor uncovers new aspects to the emerging leader's potential and in turn, allows for self discovery.
- The mentor has established a comfortable environment for learning and discussion, and enjoys watching the emerging leader's growth.



Initial Interview Questions to Ask Your Donors

What did you think when you were first told about being selected for this project?
What does the project mean to you?
What are your expectations; what are you excited about?
How do you feel about having this responsibility?



Midpoint Questions to Ask Your Donors

1. What is or is not working in your project?
2. -What is the most difficult?
3. -What do you need?
4. Who have you identified as prospective grantees? (Please submit your list to me using the Prospective Grantee Checklist.)
5. How do the prospective grantees meet our established criteria for giving?
6. -What happened that you did not expect?
7. -What were your expectations and how has the experienced differed?
8. -What have you learned so far?



Reflections on Coaching and Motivating Your Donors

Congratulations! You've begun mentoring.

Take a few minutes to reflect on how you feel about this. What questions do you have about mentoring? (Consider asking your Valentine Foundation mentor for ideas and advice.)



Manage and Monitor the Project

Objectives

In this phase of the Birthday Project your goals are to recognize the skills you need to keep the project on track, see how you're doing in completing your goals, and remove obstacles that your donors may encounter.

Ingredients

List of the skills and competencies necessary for managing a Birthday Project

Achieving Your Goals Checklist

Valentine Foundation Mentor check-in

Instructions

1. Review the list of **skills and competencies** necessary for managing novel projects, like your Birthday Project.
2. Complete the **Achieving Your Goals Checklist**.
3. Are your donors on track? Are they responding to your phone calls or emails? Do they appear confused, stressed, frustrated, or resistant?
4. Check in with your **Valentine Foundation mentor** – she can give you suggestions and tips on how to connect with your donors, identify and remove obstacles they might be having, and help you move forward.



Skills and Competencies for Effective Project Managers of Very Novel Projects

A study conducted by Jennifer Krahn in 2006 asked project managers which skills and competencies were most important for effective project management in various situations. The following list of skills and competencies were identified as important in "very novel projects". Since your Birthday Project is very novel, especially if this is your first time managing a project, this list may apply to you:

- Leadership
- People skills
- Having vision and goals
- Self confidence
- Expectations management
- Listening skills

Jennifer Krahn, "Effective Project Leadership: A Combination of Project Manager Skills and Competencies in Context," *PMI Research Conference proceedings* (July 2006), referenced in *Information Technology Project Management 6e* by Kathy Schwalbe, 2010.



Achieving Your Goals Checklist

This checklist helps you remember why you began your Birthday Project, what you hoped to accomplish, and see if you are on track.

On the website **A Girl's Guide to Project Management** www.pm4girls.elizabeth-harrin.com, Elizabeth Harrin says that her main goal is to "Stay OTOBOS" which means On Time On Budget, On Scope. Staying "on scope" means that you're doing what you set out to do – nothing more, and nothing less.

How are you doing in achieving your Birthday Project Goals?

Goals of your Birthday Project	Are you on time?	Are you on budget?	Are you on scope?
Start your project			
Create your vision statement and criteria for giving			
Select your donors			
Hold the kickoff meeting			
First check-in with your donors			
Second check-in with your donors			
Obtain a list of prospective grantees from each donor			
How are you doing with your budget?			
Identify final list of grantees			
Write checks and distribute the funds			
Hold celebration party			
Celebrate and Publicize			



Reflections on Managing the Project

Congratulations! You've been conducting your project for quite a while!!

Take a few minutes to reflect on how you feel about this. Do you like managing a project? What have you found works? What doesn't? Which of the skills and competencies important for managing a Birthday Project are you most comfortable with? Which ones are most difficult for you?



Make the Gift and Complete your Birthday Project

Objectives

In this phase of the Birthday Project you will complete your Birthday Project.

Ingredients

Donor Group discussion guidelines

Make the Gift/Project Completion Checklist

Post-Birthday Project evaluation form

Instructions

1. By this point, the donors will have identified who they want to make their donations to – their grantees. It is up to you to write the checks. You and your donor can determine who will actually make the gift to the grantees.
2. Hold a final meeting of all of your grantees. Use the **Donor Group Discussion Guidelines** to help you facilitate this session.
3. Complete the steps in the **Project Completion Checklist**.
4. Make the **gift** to the approved grantees. A [Sample Grant Letter](#) is in the Appendix.
5. Complete the **Valentine Foundation post-Birthday Project evaluation survey**. (insert link here) This evaluation will help to improve the Birthday Project materials for future groups.



Make the Gift/Project Completion Checklist

Here are the steps to complete the Birthday Project and make the gift to the grantee(s):

- Create a letter for each donation indicating why the donation is being made, from whom, for what purpose (if you are specifying)
- Write the checks (or use online donation methods) to distribute the donations to each approved grantee
 - ✓ Issue the letters
 - ✓ Include a tax information form
 - ✓ Include the check, if using paper checks
- Thank all of your donors with a personalized letter to each donor.
- Invite everyone to the celebration event (if you are having one).



Donor Group Discussion Guidelines

One of the best parts of being a mentor is seeing the growth and development of the donors. Use this final discussion as a way to highlight that growth and share the joyful experiences of becoming a new philanthropist with your donors.

Possible questions for the donor discussion:

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. Tell us something about your experience with the Birthday Project in general.
7. How did you describe the Birthday Project to your friends and family?
8. Do you think of yourself as a philanthropist now?
9. How do you think your own philanthropic activities will change due to the Birthday Project?
10. Which exercises and activities did you find the most useful?



Reflections on Making the Gift

Congratulations! You have successfully mentored your donors and made gifts that met your vision!! What an accomplishment!

What do you remember most about your project? Does any image or experience stand out for you? Would you recommend conducting a Birthday Project to other people?



Celebrate and Publicize

Objectives

In this phase of the Birthday Project you will celebrate your Birthday Project and publicize your group's efforts (if you choose to).

Ingredients

Celebration worksheet
Marketing/communication worksheet
Methods of marketing nonprofits
Press release writing instructions
Using local TV to publicize your project
Your Valentine Foundation Mentor

Instructions

1. Every great project merits a great celebration and yours is no exception. The **Celebration Worksheet** helps you decide what and how to celebrate. You don't have to celebrate, of course, but there are several good reasons to celebrate the end of your project:
 - a. A celebration brings official closure to the project.
 - b. A celebration provides an opportunity for you to recognize your donors in a public setting, giving you a chance to show how proud you are of their accomplishment
 - c. You can use a celebration as a way to publicize not just your Birthday Project, but also your organization's good work (if you are part of an organization)
 - d. Inviting representatives of your grantee organizations to your celebration gives them the opportunity to communicate their appreciation and get to know your group better.
2. The following websites offer suggestions for how to market and brand a non-profit organization. These ideas may help you determine who you might want to tell about your Birthday Project and consider ways to leverage the success of your project.
 - a. [Marketing your nonprofit](#)
 - b. [Eight basic steps to marketing your nonprofit](#)



- c. [How to market your nonprofit](#)
3. The **Marketing/Communication Worksheet** will help you consider what you want to publicize, who you want to publicize your project to, and to which outlets.
 4. Get advice on what to include in a press release, and how to write it, from the [Press Release Newswire](#).
 5. A [sample list of ways to use local television](#) to help publicize your project is available in the Appendix.
 6. Check in with your Valentine Foundation Mentor to let her know that the project has concluded.



Celebration Worksheet

What about your Birthday Project would you like to celebrate?

- We did it!!
- We donated money to some great organizations
- We want other people to conduct Birthday Projects of their own
- Others?

Purpose of celebration

- Bring all the mentors and donors back together
- Acknowledge the energy, commitment, time, and emotional investment that were involved
- Recognize the grantees/recipients of the donations
- Acknowledge the accomplishment of a stated goal
- Others?

Who to invite

- Mentors
- Donors
- Grant recipients
- Board members/trustees
- Community leaders
- Family of mentors/donors
- Employees of your organization

Celebration plan – how will you celebrate?



Marketing/ Communication Worksheet

To whom do you want to communicate? (Your target audience and other stakeholders)

What do you want to communicate?

	Ideas to communicate
<input type="checkbox"/>	Concept of an alternative method of philanthropy (mentor/donor)
<input type="checkbox"/>	The experience of mentoring (for you, for your donors)
<input type="checkbox"/>	The amount of money to be donated
<input type="checkbox"/>	The successful completion of the project
<input type="checkbox"/>	The selection of the final grantees
<input type="checkbox"/>	The list of grantees who received the funds
<input type="checkbox"/>	The types of programs that will be funded through your efforts
<input type="checkbox"/>	Other?

What outlets do you want to use to communicate your message?

<input type="checkbox"/>	Your organization's website
<input type="checkbox"/>	Your organization's annual report
<input type="checkbox"/>	Standard media (television, radio, newspapers)
<input type="checkbox"/>	Social media (Facebook, LinkedIn, etc.)
<input type="checkbox"/>	Other internet-based methods (blogs, wikis, Twitter)
<input type="checkbox"/>	Direct mail (postcards, letters to your mailing list)
<input type="checkbox"/>	Other?



Reflections on Celebrating and Publicizing

Congratulations! You've communicated your group's achievements, expanded your philanthropic reach, mentored your trusted individuals, and donated the amount you designated. Happy "Birthday"!

Have you learned anything about your own skills? Do you understand what Rebecca Maddox, business advisor and CEO of Maddox Smye meant when she said "Do it yourself; don't do it alone?" Are there any organizations that your donors identified that you want to donate to in the future? Has the Birthday Project nudged you in any different direction than you expected?

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

Maddox, Rebecca. *Inc. your dreams*. New York, N.Y.: Viking, 1995.



Appendix – Samples from the Valentine Foundation's Anniversary Project – 2010

[Return to Introduction Page](#)



SAMPLE: Elevator Speech

Elevator Speech

The Valentine Foundation 25th anniversary project commemorates our founder's legacy of educating and sharing, and assures that philanthropy for social change continues with a new generation. It will build a new community of givers, and fuel organizers and advocates that believe the world can be a better place for women and girls.

The plan is simple. Ten pairs of female donors and mentors will divide \$25,000 from the Foundation to grant to the organizations of their choice. The project is unique because of the pairing of seasoned and novice philanthropists who will:

- Inspire others
- Use philanthropy to achieve social justice for women and girls
- Create a "ripple effect" of giving
- Give new tools to donors

The project kicked off in February and will wrap up at the end of the year. You can follow it at www.valentinefoundation.org. Please contact Alexandra Frazier, Executive Director, at 610-624-4887 for more information.

[Return to Start Your Project](#)



SAMPLE: Project Committee Roles and Responsibilities

COMMITTEE ROLES AND RESPONSIBILITIES

There are two goals for this committee in the next 14 months. First, to select and mentor the 10 women who will be giving away \$2,500 each of the Valentine Foundation's funds. Second, to help plan the 25th Anniversary event, which will take place in November of 2010, and at which time the grant announcements will be made.

Mentoring

- A. The committee will nominate women to be the donors of \$2500
- B. The committee will select 10 women to be the donors
- C. A committee member will be paired with each donor and she will advise and support her through the grantmaking process, including site visits and preparation of the appropriate application and reporting forms.
- D. Participate in scheduled meetings.

Event Planning

A sub-group of this committee, plus some Foundation trustees will help plan and organize the 25th Anniversary event. The Valentine trustees have decided that the grantmaking project will be the centerpiece of the 25th Anniversary celebration, and that there will NOT be an elaborate party. There may be a low-key gathering and/or a published piece about the project.

[Return to Start Your Project](#)



SAMPLE: First Committee Meeting Agenda

To: 25th Anniversary Committee

From: Alexandra Frazier

Date: September 29, 2009

Welcome to the Valentine Foundation 25th Anniversary committee. Thank you for agreeing to serve. We hope you will enjoy being a part of this wonderful, diverse group of women and that the process is as much fun as the culminating event in November 2010.

The purpose of this project is to:

1. Celebrate Valentine Foundation's 25 years of philanthropy for women and girls;
2. Build leadership and a community dedicated to social change for women and girls;
3. Provide an opportunity for women to be philanthropists who would not otherwise have had the chance;
4. Gain visibility for the Foundation and its work; and
5. Leverage and extend the foundation's grantmaking and networking beyond its regular cycle and program.

Enclosed are materials that you will find useful to you as a committee member:

1. Agenda for this meeting;
2. Address list of committee members;
3. Project timeline;
4. Committee roles and responsibilities; and
5. Draft application form.

I hope that today's meeting will clear up any questions you may have, but if you find you need anything else, please feel free to contact either me or any other member of the core committee; Ann, Alex, Nancy and Cynthia.

Thanks again for agreeing to serve!

[Return to Start Your Project](#)



SAMPLE: Donor Nomination Form

Name of Proposed Donor:

Mailing address:

County:

Urban Suburban Rural (pick one)

Phone:

Email:

Approximate age:

Race/Ethnicity:

Work place or school:

Will the donor be available for the length of the project?

How do you know the prospective donor?

Write a paragraph about your nominee below. You may want to address his or her life experience, interest in learning about your Birthday Project's issues, and why you think she would be a strong candidate for your Birthday Project.

[Return to Select Donors](#)



SAMPLE: Invitation to Kickoff Meeting

December 5, 2009

Dear Birthday Project Donors;

Congratulations on your nomination and selection as one of the 10 Valentine Foundation donors! I am delighted to welcome you to the project and look forward to working with you in the coming year. Each of you has been matched with a mentor who will guide you through the project and be a resource if you have questions. I have attached the list of the pairings so you can see all the wonderful women that are involved in the project.

By way of background, the founder of the Valentine Foundation, Phoebe Valentine, upon the occasion of her 50th birthday, decided to give the gift of philanthropy to women she knew and admired, but who would probably never be in a position to personally make a substantial charitable grant. Phoebe wanted to a) share the joy of making a grant b) demonstrate the seriousness of the process and c) spread her own wealth into new areas.

As the trustees of the Valentine Foundation pondered how to celebrate the Foundation's 25th Anniversary, the thought of recreating Phoebe's own project seemed a perfect way to honor our founder and celebrate our milestone. So, the trustees decided to take \$25,000 from their grantmaking pool in 2010 and entrust it to others to give away. Each of you donors will direct a grant in the amount of \$2,500.

By way of process, the mentors are having a meeting in early January to go over what they need to do to get you, the donors, started. After that meeting, your mentor will be in touch with you.

In the meantime, I invite you to go to our website www.valentinefoundation.org and look at our history and past grantmaking.

Again, welcome to the project and enjoy your holidays!

Alexandra Frazier, Executive Director

The Valentine Foundation

[Return to Select Donors](#)



SAMPLE: Request for List of Prospective Grantees

Dear Valentine Mentors and Donors:

Hope your summer is going well and that you are making progress with your grantee selection. It is time for you to let me know which organizations you are thinking of funding. These do not have to be your final choices, and you can have several at this time, but I do need a list from you so that I can check for conflicts of interest. I will notify you either way as soon as I can. I look forward to hearing from you.

Alexandra V. A. Frazier, Executive Director
Valentine Foundation

[*Return to Coach and Motivate Donors*](#)



SAMPLE: Grant Letter

Executive Director
(Organization name)
(Organization address)

(Date)

Dear (Executive Director's name):

On behalf of the trustees of the Valentine Foundation I am pleased to enclose a check in the amount of \$2500 representing a grant to (the organization). This grant was made on the recommendation of (Donor's name) as part of the Foundation's 25th Anniversary Project.

The Valentine foundation 25th Anniversary Project commemorates our founder's legacy of educating and sharing, and assures that philanthropy for social change continues with a new generation. It will build a new community of givers, and fuel organizers, advocates, and service providers like you that believe the world can be a better place for women and girls. For more information about the Project and the Foundation, go to www.Valentinefoundation.org.

Please submit a summary of how the funds were spent and a brief narrative (no more than one page) about the impact of the grant by December 31, 2011. We would like to use the grantees' stories on our website and in our newsletter. We would also appreciate if you could share any photos taken in connection with this project.

Please acknowledge receipt of the check by signing and returning the extra copy of this letter to me in the enclosed envelope.

Sincerely yours,

Alexandra V. A. Frazier, Executive Director

Cc: (Donor)
(Mentor)
(Your Board Chair)

[Return to Make the Gift](#)



SAMPLE: Ways to publicize your project on local television

An NBC news contact had several suggestions to help publicize the Valentine Foundation Anniversary Project:

- o Send a crew to film footage at our mentor/donor get-together on Sept. 13th
- o Have a donor, mentor, and the Valentine Mentor come to be interviewed on the Good News Show at the studio
- o Send a group of us to the filming of an NBC 10 show sometime before the November event. We could be recognized on the show and one person from our group could speak.
- o Have the news show cover the actual event of awarding the grants in November

[Return to Celebrate and Publicize](#)