

The Mentoring for Organizations Handbook

by Judith Sulsona

For The Community Foundation for Monterey County



Mentoring for Organizations

About the Handbook

The Community Foundation for Monterey County's Center for Nonprofit Excellence has provided mentor-assisted technical assistance and capacity building support for several cohorts of small organizations through capacity building programs such as the Community Leadership Project (CLP) and Next Steps for Small Nonprofits. The Handbook's author also used this mentoring model in supporting grantees of initiatives sponsored by other foundations, including the Salinas Youth Initiative of the David and Lucile Packard Foundation.

The Mentoring for Organizations Handbook attempts to capture the lessons learned over many years of partnership with small and grassroots organizations that work tirelessly and courageously to improve the conditions of the communities where they work and call home, sometimes with very few resources. Our hope is that you

find it useful as you design your own program or services. The companion online [Mentor's Toolbox](#) features resources that can be accessed by funders, consultants, mentors, as well as organizational leaders for their own capacity building efforts.

Acknowledgements

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Chapter 1: The Organization Mentor Concept

Introduction

In 2010, the Community Foundation for Monterey County launched the Community Leadership Project (CLP).^{*} Its aim was to strengthen small or nascent nonprofit organizations in Monterey County, particularly those led by or serving communities of color, and eventually included grantees in Santa Cruz and San Benito Counties. Since many of the participating organizations were new to the concept of building capacity, the program’s designers understood early on that the funded organizations would need significant and ongoing support to take advantage of the resources the initiative provided.

Evolution of the Mentor Concept

In thinking about how to best support the organizations, the program designers took several key understandings into consideration.

Grassroots organizations with a strong sense of mission, given the choice to invest in capacity building or in programs, will usually choose to allocate their funding to providing services to the community. Therefore, capacity-building support would need to be designated for that purpose or provided at no cost and be an integral part of the grant program. This type of support is most effective if combined with multi-year operational

funding.

Traditionally structured consulting or coaching relationships would not be sufficient to make the support fully accessible to the participating organizations. The organizations would need a resource person with deep experience in small or grassroots organizational development who could be a partner in this development. This person would have the flexibility to co-design the relationship based on each organization’s needs and aspirations and interact with its leaders in a mutually agreed-upon schedule and process. This person was called a “mentor,” combining the characteristics of a personal mentor with the technical assistance approach and structure usually associated with consulting or coaching relationships.

The mentor offered a sounding board; connections to resources; and supportive, non-judgmental counsel - all while supporting goals and aspirations defined by the organization. The mentor was not expected to provide all the answers to the organization’s challenges, but rather support the organization in finding its own solutions.

As the concept evolved, it became clear that the mentor could help build the capacity of the organization while also helping the organization’s key staff, volunteers, and board members develop their own leadership capacities.



This approach was tested for the seven years of the CLP and was incorporated into other funding initiatives in the region. Although these initiatives included a variety of funding and capacity building approaches, the “mentor” model was primarily the same. The consultants who developed the original model continued to play a mentor role - learning, refining and documenting the model as the experience unfolded.

Characteristics of Organizations Mentored

The mentorship approach was initially conceived as a method for supporting small, grassroots, or nascent organizations, whose leaders had limited or no experience managing an organization. Some organizations had secured their 501 (c) 3 status, while others were fiscally sponsored groups.

In terms of organizational capacity, most of the organizations mentored began their work firmly grounded in their passion for improving the quality of life of people in their communities. Common strengths included:

- A strong sense of values, mission, and commitment to serving and empowering their community and its leadership.
- A core group of committed, honest, hardworking staff, volunteers, and leaders.
- Significant leadership potential.
- Engagement of a sector or population often underrepresented or marginalized.

However, the groups needed to improve their capacity to manage and sustain their work. Common challenges and areas the organizations needed to develop included:

- Consistent staffing to do basic organizational work, and systems to hire and manage staff.
- Full, effective boards of directors/advisory committees and well-defined leadership teams.
- Adequate facilities from which to operate, provide services, or convene community.
- Stable sources of funding.
- Support in creating fund development or business plans.
- Organizational systems or tools to manage funds, use technology or evaluate programs.
- Tools to help the organization think beyond immediate needs and activities, such as a well-thought-out vision or documented strategic, long-term plan.
- Internal policies (financial, risk management, personnel, etc.) to assure effective, understandable and reliable operations.
- Effective means of communicating the vision, mission and outcomes of their work.

The mentor approach allowed these organizations to strengthen their organizational infrastructure at a pace and sequence appropriate to their specific situation and interests.

Over time, the mentors also supported more mature organizations and seasoned leaders who found the opportunity to work closely with an experienced colleague and partner very useful, particularly if the organization or the leaders were facing a significant change in direction or challenging circumstances.

**The funders supporting the Community Leadership Project were the David and Lucile Packard Foundation, the James Irvine Foundation, and the William and Flora Hewlett Foundation.*



Chapter 2: Effective Mentoring

Chapter 1 introduced the concept of mentoring for organizations. A capacity building program based on this concept requires consideration of the characteristics of effective mentors, as well as the key practices that contribute to useful mentoring. This chapter summarizes our observations based on our experience as mentors and managers of mentors.

Steps in The Mentoring Process

The mentoring for organizations process includes the following steps:

- Learning about the organization's history, leaders, community, and cultural context.
- Investing time in building trust, relationships, and agreements.
- Facilitating organizational self-assessment and reflection.
- Helping the group identify and prioritize capacity building needs.
- Developing capacity improvement plans.
- Helping to identify consultants and other resources to support the implementation of the capacity improvement plan; bridging communication with consultants, if needed.
- Communicating monthly (or more often, as needed), to monitor progress, address questions, navigate problems, bring an outside perspective to think through and evaluate options, connect to resources, assess the effectiveness of the mentoring relationship, etc.
- As needed, facilitating board or staff discussions to help make critical decisions for the organization.
- Reviewing documents, funding applications, and reports. If the mentor is working in partnership with a foundation, ensure that grant guidelines are clear and deadlines are met.
- Strengthening the organization's network and group of allies. Bringing groups together to build relationships, share resources, and



experiences, and learn from each other.

Values of Effective Mentors

- Respect for the intelligence, experience and knowledge of the groups being mentored.
- Commitment to the success of others.
- Humility.
- Trustworthiness.
- Honesty in representing their knowledge and skills and comfortable saying "I don't know," when warranted.
- Integrity.
- Life-long commitment to learning and critical thinking.

Required Skills, Knowledge, Attitudes

- Willingness to share skills, knowledge, and expertise.
- A view of the mentor/organization relationship as a partnership for mutual learning.
- Ability to support organizations in achieving their own goals and sustainability as they

define it.

- Willingness to teach what they know and to adapt to the organization's circumstances, learning styles, and stated goals and aspirations.
- A positive attitude, with the ability to be a positive role model.
- Reliability in meeting deadlines and fulfilling promises.
- Personal attributes required to be successful as workers in their field and to serve the community with authenticity and commitment.
- Generosity in sharing resources.
- Facilitation skills, with ability to work through dialogues that result in solutions and to navigate difficult conversations.
- Respectful of confidentiality.

Essential Practices of Effective Mentors

The methods used by the mentors to establish strong partnerships with the organizations revealed a set of essential practices. The most effective mentors:

- **Learn about the groups and their leaders.** Guidance and support need to be relevant to the organization. Knowing the organization and its leaders, its history and experiences, and its cultural context enables the mentor to provide useful direction and helps avoid "one-size-fits-all" approaches.
- **Build trust, maintain confidentiality.** Mentored leaders and teams will sometimes need to share serious concerns and conflicts within the organization or among partners. A trusting relationship creates the environment for candid conversations to happen. Organizations and leaders may share sensitive information, both personal and about the organization. The mentor must maintain confidentiality and only share the information with others when expressly authorized by those who provided

it. In circumstances when the mentor feels ethically compelled to share the information, it should be openly discussed with the person or team mentored.

- **Foster independence and self-reliance.** The ultimate goal is to build the capacity of the leaders to manage and sustain the organization in the long-term, with independence and confidence. This will be possible if leaders develop critical thinking skills and learn how to make informed, thoughtful and collaborative decisions.
- **Support the development of leaders and leadership teams.** The aim is to strengthen their professional knowledge and skills, so that the capacity and sustainability of the organization can be enhanced.
- **Start where they are.** It's important to respect that organizations need to start building capacity from where they are in their development, and the leadership will decide their direction and capacity building goals.

Potential Challenges

Building organizational capacity can be challenging for any organization regardless of their stage of development, but it is particularly difficult for small or nascent organizations without the depth of experience to manage change and growth. Mentors need to bring that maturity and skill, along with an understanding of common challenges, keeping in mind that:

- Capacity building might be a new concept. Many grassroots groups or emerging organizations are unfamiliar with this type of assistance. They need support to understand how to assess, plan and engage with resources – and they need sufficient time for this.
- Building capacity takes time. Groups and funders often underestimate how long it takes to learn and implement changes. Often, priorities and steps must be added and/

or reordered to accomplish a specific goal. These changes can be challenging for the organization and the mentor, as they must both devote more energy, time, and resources to accomplish a goal than initially expected.

- Time is limited. Some of the groups may not have staff. Volunteer leaders or board members who take on staff roles may have jobs, families to care for, and other demanding responsibilities.
- Needing to start where they are. Each organization starts from a different stage of development, so flexibility in testing different strategies and approaches is needed for the strategies to be effective and relevant to the organization.
- Communication and access to resources need a “bridge.” Small communities may have few consultants who understand small or grassroots organizational development and who can help guide an organization that works within a specific cultural context. It is important for the mentor to, at times, be a bridge, translator, and interpreter between the organization, consultants, and other technical assistance providers.

Developing New Mentors in the Community

A successful mentorship relationship requires alignment of the mentor’s personality, values and skill with the organization’s culture and stage of development. In selecting a mentor, the organization or funding partner must look for both personal attributes and technical expertise that will be appropriate for the organization’s needs. Personal attributes and technical expertise can be learned and developed over time. A mentor development process begins with the following steps:

- Assess the potential mentor’s skills and experience (download the [Mentoring Skills Checklist](#).)
- Create a Mentor Development Plan, based on the improvement areas identified through the [Mentoring Skills Checklist](#).
- Provide training, coaching and support, particularly in consultation with an experienced mentor (e.g., shadow the experienced mentor; work as a mentorship team).
- Emphasize in the training the need to develop and use capacity building resource selection criteria to determine which resources would best align with the organization’s needs.
- Share a list of recommended resources to enable the mentors to develop their library of resources.

The next chapter focuses on organizational self-assessment, an important early step in the mentorship and capacity improvement planning.



Chapter 3: Organizational Self-Assessment

In the previous chapter, we summarized the steps in organizational mentoring, characteristics of a good mentor, and effective mentoring practices. In this chapter we cover organizational assessment as an important early step for informing capacity building goals.

An organizational self-assessment is an analysis and evaluation by the organization's leaders and stakeholders (e.g., board members, staff, volunteers, participants, key supporters) of the organization's direction and capacity to meet its own goals. Through the process, leaders identify shared concerns and prioritize actions.

The assessment process can be guided in one of two ways:

1. Through a facilitated discussion designed for the group with the support of a facilitator or mentor. Here is an [example process framework](#). This process is well-suited to small or emerging organizations who may have not engaged in capacity building efforts in the past.
2. By using a tool designed for this purpose and adapted to the circumstances of the organization. The implementation of the tool and analysis of results also benefit from the support of an experienced facilitator.

Facilitated Discussion Purpose

An assessment conducted through a facilitated discussion is designed with the following purposes:

- Make the assessment process accessible for the group, regardless of its stage of development.
- Guide the group in reaching agreement about the long-term vision of the organization.



- Identify how the board, staff, and volunteers will be organized to fulfill the mission and realize the vision.
- Determine what assets the organization can build upon and what challenges it will need to address, including internal capacity and resources, and external relationships and opportunities.
- Develop an action plan for the steps the leaders will take to strengthen the organization and secure its future.

Strategic Questions

Strategic questions to ask include:

- Who is your “community”? Whom do you serve and engage?
- How do you define achievement or success?
- Vision for the Future – In Two Years:
 - Your organization will be...
 - Your organization will do ...
 - How much do you want to grow? In what ways?
- What are the key issues impacting the organization now?
- Do you have the organizational and human resources necessary to realize your vision and fulfill your mission?
- How is the work currently organized?
- What else /more is needed?
- What are your short-term goals? (2-3 years)
- What steps will you be able to take to achieve your goals?
- What other steps are needed but will need greater capacity to undertake?

- What resources do you have to begin your journey? What else will you need?
- Do you have community support?
- Who are your supporters, partners and allies?

Chapter 4 will go into more detail about capacity improvement plans: creating, implementing, and monitoring plans with mentor support.

See the online [Mentor's Toolbox](#) for organizational assessment resources.

Chapter 4: Planning for Capacity Improvement

The organizational self-assessment process discussed in Chapter 3 lays the groundwork for capacity improvement planning. This chapter provides more details for creating capacity improvement plans as well as the mentor's role in helping monitor progress and supporting implementation.

Capacity Improvement Planning

Through facilitated dialogue and reflection on the assessment results, leaders identify and prioritize capacity improvement goals for the organization. The mentor supports the organization in setting goals that are grounded in the realities of the community where they work and the organization's capacity and potential.

The elements of the Capacity Improvement Plan will typically include:

- The organization's mission, vision and values
- Desired long-term capacity improvement outcomes
- Capacity improvement goals
- Milestones to reach within specific timeframes

to achieve goals

- Actions required to reach milestones
- People responsible for leading actions
- Resources and support the organization will need to implement the plan.

See the online [Mentor's Toolbox for a sample Capacity Improvement Plan form.](#)

Mentoring for Implementation and Long-Term Support

Once the capacity improvement plan is adopted and the organization has clear goals, the mentorship process transitions to supporting the implementation of the plan and to working alongside leaders, as they work on their own growth and development.

Although the plan has specific action steps, the mentorship extends beyond the structure of the plan to address any unexpected issues that may arise for the organization and any concerns impacting the leaders. The mentor also supports the organization in amending and updating the plan, as needed.

The mentorship process includes the following elements:

- **Regularly scheduled meetings, usually monthly.** Although meetings may be held via phone or video conference occasionally, in-person meetings are more effective in strengthening the relationships and learning about the environment and culture of the organization. It is important to note that many small or nascent organizations will not have a facility or offices of their own. Meetings may be held at other locations, including homes or coffee shops. Flexibility is needed for the days and times when meetings are held, particularly if volunteers are part of the leadership team being mentored.



- **Other opportunities for communicating.**

Leaders and mentors may also have impromptu meetings in person, telephone, or video conference as needed. Calls in which the mentor act as sounding board for exploring options, problem solving, conflict resolution, or simply “a friendly ear” are common and helpful. In phone calls, emails or texts, leaders often seek advice on issues that surface between meetings or for moral support on burnout, life-work balance, unexpected problems, conflict, fear of failure, or self-doubt.



Providing Additional Support

Additional support includes:

- Following up on issues discussed at the meetings.
- Referrals to consultants
- Providing sample tools and templates, journal articles and other reading materials, websites, names of peers or colleagues who can also provide advice, etc.
- Assessing progress with consultants and other TA providers, including review of the effectiveness of the relationship with the consultant, the alignment with the agreed scope of work, and the ability of the group to adapt and adopt what they learn and act on recommendations.
- Sharing announcements of opportunities, such as training, conferences, grants, etc.
- Presenting at board or committee meetings. Occasionally the organization needs an orientation on the use of resources or facilitation of a conversation to overcome an obstacle and arrive at a decision. The mentor can be an objective facilitator and trainer.
- Reviewing documents. Leaders may sometimes ask the mentor to review materials they’ve created and provide feedback. These include

job descriptions, strategic and others plans, case statements, grant proposals, etc. They may also ask for a review of plans developed with a consultant to ensure alignment with other organizational plans.

Keeping Groups on Track

The Capacity Improvement Plan is a roadmap for tracking the group’s progress. At regularly scheduled meetings, the leaders and mentors review movement toward milestones based on the timeframe the group adopted for its goals. Through this review, challenges that impede progress are also identified, as well as changes in the organization and community that may require shift in direction or a modification of the plans. This may include changes in the consultant or other resources used, and funding reallocation for the use of technical assistance. The mentor and leaders work together to review options and support the organization in making those decisions. The mentor may also provide guidance or facilitation in communicating with the funders who provided the financial support for those resources.

If the mentor is working with the group over a number of years, it is helpful to update the Organizational Assessment and Capacity Improvement Plan annually to ensure that the organization reflects on its progress and that plans remain relevant in moving the organization forward, as the organization evolves and as community conditions change.

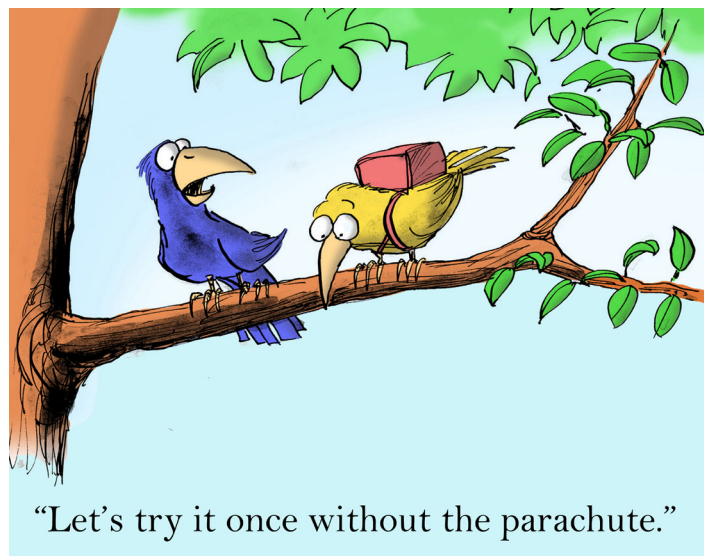
If the mentor is working in partnership with a funder, the mentor can also play an important role in ensuring that grant applications and reports meet the required deadlines.

The mentor can also systematically track progress with a Tracking Sheet. The Tracking Sheet is a log a mentor can use to document their interaction with the groups, follow-up steps to take, resources to provide, and the group's major milestones. It is a useful running history of the group's path toward achieving its goals and of the lessons learned along the way by the leaders and the mentor.

Sample Tracking Notes

Group ABC

October 2018 - Resident Advisory Council will support new program direction and expand its membership. Exploring ways to facilitate meetings to overcome travel and scheduling challenges.



November 2018 - A new plan was developed to provide a capacity building path for the new program, focusing on: (1) Strengthening partnerships; (2) Developing relationships with families; (3) Developing a sustainability plan for the organization.

Group XYZ

June 2018 - Evaluating opportunities to expand earned income. Planning board retreat to discuss long-term direction of organization and the organizational structure, staffing resources, etc. that will be necessary to support it.

July 2018 - Transitioning Program Assistant to Program Coordinator. Requested advice on finding a consultant to conduct salary survey and to guide them through the process of writing job descriptions, etc. Provided list of consultants and resources to consider, as well as recommended they reach out to Group ABC, who just went through that process.

Group NMQ

May 2018 - Experienced significant progress in the past year. Have increased staffing, expanded programs and have grown in visibility and influence in their field of work through strategic partnerships. Also increased ability in financial management.

June 2018 - Called to discuss concern about need to expand fund development plans. Feeling some pressure to accelerate fund development activities due to expansion of staff and programs in the coming year. Will focus our August meeting on fund development planning.

When is it Time to Change Direction?

Through consistent communication with leaders and by carefully monitoring the organization's progress, the mentor will become aware of moments when it is time to consider adjusting the original capacity building direction. Those moments are commonly found when:

- Improvement strategies require a course correction. After attempting to implement changes using selected strategies and actions, the group may find that other approaches might be more effective. Also, conditions in the organization and/or community may change significantly, thus requiring a course correction in the organization's plans. The mentor supports this process by facilitating analysis, asking strategic questions, proposing new options, and connecting to new resources.
- There is a leadership change. Such a change may require a period of learning and adjusting to a new leader's style and level of experience. Although the organization's vision and mission do not change, the priorities and timelines may need to be adjusted. The new leader will likely bring new ideas and approaches to achieving the organization's goals. The mentor will need to work with the leadership team and the new leader to assess progress on the original plan; consider new options, if necessary; and adjust the plans accordingly.
- A crisis arises. Strong organizations can adapt to sudden change and are able to respond to crises without jeopardizing the organization's stability. However, others may not have the experience and tools to manage change under crisis conditions. The organization's mentor can act as a calming influence and play a significant role as a supportive ally, facilitator of difficult conversations, and connector to other resources or advisors to support the organization through difficult times.
- It's time for the mentor to exit. Developing self-reliance in the organization and expanding its network of support will help prepare the organization for the mentor's departure. The mentor's eventual exit should be part of the mentorship plan developed in partnership with the organization. It can help if the exit is gradual, allowing for occasional calls and communication after the formal relationship ends.

Celebrate Achievement!

As the relationship between the mentor and organization ends, reflecting on and celebrating progress toward achieving the goals – and moving closer to the vision set at the beginning – provides a shot of energy and inspiration for the future. Part of the reflection can include a discussion on how the organization will continue to make capacity building part of its culture. By now, the organization will have had sufficient experience to understand and appreciate the value of self-assessment and capacity improvement planning. They will also have learned how to access and use relevant resources – getting the help they need to support their continued growth.

Appendix: The Mentor's Toolbox

The [online toolbox](#) contains a sampling of tools and resources that were created, adapted, or used by the consultants who designed and implemented the mentoring for organizations programs. They are organized into categories (at right) typically of interest to small nonprofit organizations, but also useful for organizations of any size.

Selecting Tools

Tools can be a variety of resources that mentors either create or bring to the attention of the organization's leaders to support their identified capacity building needs. They may include trainings and conferences, webinars, books, articles, websites, templates, assessments, questionnaires, checklists, guidelines, sample plans, policies, sample bylaws, job descriptions, among many others. Developing, identifying, and recommending tools requires careful examination of their suitability and relevance for the organization and the purpose for which it will be used. Our criteria for selecting tools include those that are:

- Presented by a reputable source or developed and tested by the mentor.
- Used or tested effectively (and endorsed) by other organizations or consultants.

- Up-to-date or timeless in its content.
- Appropriate for the needs, culture, context, and developmental stage of the organization or easily adaptable to meet those needs.
- Accessible in terms of language.
- Within the organization's capacity to implement.
- Supportive of reflection, critical thinking, and learning.
- Compatible with the organization's values and mission.
- Useful in explaining, synthesizing, or simplifying complex processes.
- Useful for promoting collaborative planning and decision-making.
- Published to be shared, used, or adapted without copyright restrictions other than attribution.

The mentor should work with the organization to ensure that:

- The tool is adapted to fit the organization's needs and circumstances.
- Use of the tool does not distract from the time needed for critically important analysis, thinking, and discussions.
- It is not seen as a "quick fix" to the challenge of allocating time and resources to good planning and for making important decisions.

Working with Consultants

Consultants and other technical assistance providers can be excellent resources for building organizational capacity. Time and financial resources are often limited, so selecting the right consultant is essential.

Criteria for Selecting Consultants

- Connection with and understanding of the organization's mission, values and culture.
- Interest in the organization.

Toolbox Menu

- Advocacy & Community Engagement
- Board of Directors
- Facilities Planning
- Fund Development
- Marketing & Communications
- Organizational Assessment
- Organizational Management
- Planning & Evaluation

- Relevant background and expertise, including both functional expertise and subject matter work/life experience.
- Experience with similar organizations.
- Ability to execute the project successfully within budget parameters, time frame, etc.
- Known as trustworthy, respectful, collaborative and flexible.
- Communication style, wisdom, critical thinking skills, emotional intelligence, and listening skills demonstrated through interviews and confirmed through references.
- Support the organization in developing a formal written contract or simple letter of agreement to clarify the engagement and expectations, formalize the relationship, and give both parties the appropriate guidance for resolving any problems that may arise. The letter of agreement should include a detailed description of the work to be done, timetables/ milestones, required resources, expected outcomes or deliverables; and agreed budget.
- Support the organization once the work begins by asking questions about progress at the monthly meetings. The consultant may at times ask the mentor for support in communicating with the organization’s leaders to ensure that the work progresses as planned and desired, or to discuss course correction, if necessary.

Process for Engaging Consultants

For many small or emerging organizations, working with a consultant will be a new experience. The mentor can play a critical role in facilitating a successful engagement. The mentor is often a bridge and translator of the organization’s needs and the consultant’s offerings. Guiding the organization in the process of selecting, engaging and working with a consultant or technical assistance provider is an important step in building the organization’s ability to use these resources and in developing self-reliance. In selecting and engaging a consultant, a mentor can help:

- Clarify what support is wanted and needed and work with the organization to develop a scope of work for the project.
- Provide names and credentials of consultants with relevant skills and encourage the leaders to review the credentials and contact the consultants to explore their interest and availability.
- Provide sample Requests for Proposal (RFP) and support the organization in developing their own for this engagement.
- If needed, work with the leaders as they evaluate the proposals and select their preferred consultant. This may include attending interviews between the leaders and consulting candidates.

A Few of our Favorite Online Resources

[Board Source](#)

[Free Management Library](#)

[Chronicle of Philanthropy Resources](#)

[CompassPoint](#)

[Foundation Center](#)

[Grassroots Institute for Fundraising Training \(GIFT\)](#)

[GuideStar](#)

[Idealware](#)

[National Council of Nonprofits](#)

[Stanford Social Innovation Review](#)

[Nonprofit Quarterly](#)

[Strengthening Nonprofits: A Capacity Builder’s Resource Library](#)