



# Mentorship Program Workbook



Welcome to the Mentorship Program!

We're so glad you've decided to take this next step in your career. Whether you are in the Mentorship Program to seek advice from a seasoned fundraising professional, or you are that seasoned fundraising professional looking to help a newcomer to the field, we are glad to have you be a part of the program!

As it is outlined in the memorandum, the Mentorship Program lasts 8 months (April – December). It is the Mentee's responsibility to organize the meetings and the meeting content. Mentor's please be candid with your Mentee as they might not know all the questions to ask.

Throughout these next 8 months, the mentoring team will be in touch with you to check in to see how your pairing is going. Not all matches are a good fit the first time around. Please share with us if you would like a different partner.

As well, we want a picture of you two and a quote so we can include you in a spotlight in the chapter's newsletter!

We have developed this workbook to be a guide for the Mentor and Mentee. Please use it as a guide, not as rules to follow. There are a lot of examples and content throughout it to help you in case you get stuck, but also a document to keep all your notes in one place.

We hope you enjoy this Mentorship Program! We are here if you ever have any questions.

Sincerely,

Brie Juran  
AFP Mentorship Co-Chair  
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AFP Mentorship Co-Chair  
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# Mentoring Program

## Memorandum of Commitment

The AFP – Greater Cincinnati Mentoring Program demonstrates a commitment to our members to provide value-added services to their professional development. The following Memorandum outlines the commitment required from both Mentors and Mentees as part of the Mentoring Program.

**PROGRAM GOALS: In advancing philanthropy through education, training and advocacy, The AFP Greater Cincinnati Chapter aspires to the following:**

- To promote collegial relationships between seasoned professionals and Mentees.
- To assist fundraising professionals in developing a network for professional guidance and creative fundraising.
- To strengthen the Mentee's skills through identification and focus on specific areas of practice.
- To enhance the professional abilities of both the Mentor and Mentee through shared effort.
- To offer an adaptable, responsive and accountable program.
- To respect confidentiality.
- To promote fun through shared experience and practice.

### **MENTOR COMMITMENTS**

- Commit to the role of Mentor for 8 months (April 0 December).
- Conduct a meeting with your Mentee once a month. Ideally these meetings should be face-to-face and last about an hour. Occasionally, due to schedule demands, meetings might occur over the phone.
- Provide guidance, wisdom, and support to your Mentee that accelerates their learning process.
- Help your Mentee set targets and support them in achieving those targets.
- Support the Mentee in meeting their specific needs in their development as a fundraising professional.
- Help the AFP Mentorship Chair support the program by completing an evaluation form at the end of the program.

**Mentor Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

### **MENTEE COMMITMENTS**

- Commit to be involved as a Mentee for 8 months (April – December).
- Conduct a meeting with your Mentor once a month. Ideally these meetings should be face-to-face and last about an hour. Occasionally, due to schedule demands, meetings might occur over the phone. Requests for and scheduling of the meetings are the responsibility of the Mentee.
- Identify areas of focus to work on with your Mentor to achieve personal growth in the profession.
- Prepare questions and work for review in advance of meetings to make the most of the time available.
- Be respectful of all meeting dates and times scheduled.
- Help the AFP Mentorship Chair support the program by completing an evaluation form at the end of the program.

**Mentee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

## Contact Information & Goals

After you have been paired with your mentor/mentee, take a moment and ask them for their contact information so you can stay in contact with them and set up monthly meetings.

### Mentor's Contact Info

Name: \_\_\_\_\_

Employer: \_\_\_\_\_

Job Title: \_\_\_\_\_

Email: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

### Mentee's Contact Info

Name: \_\_\_\_\_

Employer: \_\_\_\_\_

Job Title: \_\_\_\_\_

Email: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Refer to your AFP Mentoring Program application and write down three measurable goals you would like to accomplish with the assistance of your mentor.

1) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How do your goals for the AFP Mentoring Program align with your career goals?

What are your career goals over the next 5 – 10 years? How could your time with your mentor help you achieve those goals?

# Mentoring Meeting #1

Topic: \_\_\_\_\_

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

Notes:

Suggested meeting topic:

- **Getting Started in the Fundraising Field:**
  - Get to know each other: employer, family, career goals, strengths, weaknesses, etc.
  - How did you get started in fundraising? Why did you choose fundraising? Why did you choose your agency?
  - What tips do you have for someone who is new in the field?
  - How do you handle the work life balance?
  - Discuss what you two are looking to gain from this experience

Key Takeaways:

Action items for next meeting:

Next meeting Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

# Mentoring Meeting #2

Topic: \_\_\_\_\_

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

Notes:

Suggested meeting topic:

- **The Important Stuff**
  - AFP Benefits
  - The Donor Bill of Rights
  - AFP Code of Ethics
  - What is the CFRE?
  - Ethical moments your mentor has experienced while being a fundraiser
  - Challenges your mentor faces professionally
  - What are your mentor's weaknesses and how do they work to overcome them?

Key Takeaways:

Action items for next meeting:

Next meeting Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

# Mentoring Meeting #3

Topic: \_\_\_\_\_

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

Notes:

Suggested meeting topic:

- **Taking Your Career to the Next Level:**
  - Talk about the goals you initially set up when you signed up for a mentor.
  - Discuss long term career goals in detail and draw a road map to chart your course

Key Takeaways:

Action items for next meeting:

Next meeting Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

# Mentoring Meeting #4

Topic: \_\_\_\_\_

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

Notes:

Suggested meeting topic:

- **Ongoing Support:**
  - How can you help your mentor?
  - Are there any other organizations that your mentor is a part of that they would recommend you get involved with to you achieve your career goals?
  - How does your mentor stay connected to the news and other professional development opportunities? (e.g. Chronicle of Higher Ed, Movers and Makers, podcasts, Business Courier, AFP webinars, AFP Networking & Knowledge, conferences, etc.)

Key Takeaways:

Action items for next meeting:

Next meeting Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_



# Mentoring Meeting #5

Topic: \_\_\_\_\_

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

Notes:

Suggested meeting topic:

- **Helping Each Other:**
  - Attend an event that each other's agency hosts or attend an event together and make introductions to new people in the room.
  - Mentors show your mentee how to work the room.

Key Takeaways:

Action items for next meeting:

Next meeting Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

# Mentoring Meeting #6

Topic: \_\_\_\_\_

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

Notes:

Suggested meeting topic:

- Goal Check-In
  - Give a progress report on the goals you originally established at the first meeting.
  - Discuss successes, challenges, and opportunities that have come up as a result of tackling these goals.

Key Takeaways:

Action items for next meeting:

Next meeting Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

# Mentoring Meeting #7

Topic: \_\_\_\_\_

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

Notes:

Suggested meeting topic:

- Continuing Your Relationship:
  - Go out and celebrate in December your accomplishments and discuss what your mentoring relationship will look like after December.

Key Takeaways:

Action items for next meeting:

Next meeting Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

# Mentoring Meeting #8

Topic: \_\_\_\_\_

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

Notes:

Key Takeaways:

Action items for next meeting:

Next meeting Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

# Appendix

## Meeting Suggestions

- **Getting Started in the Fundraising Field:**
  - Get to know each other: employer, family, career goals, strengths, weaknesses, etc.
  - How did you get started in fundraising? Why did you choose fundraising? Why did you choose your agency?
  - What tips do you have for someone who is new in the field?
  - How do you handle the work life balance?
  - Discuss what you two are looking to gain from this experience
  
- **The Important Stuff**
  - AFP Benefits
  - The Donor Bill of Rights
  - AFP Code of Ethics
  - What is the CFRE?
  - Ethical moments your mentor has experienced while being a fundraiser
  - Challenges your mentor faces professionally
  - What are your mentor's weaknesses and how do they work to overcome them?
  
- **Taking Your Career to the Next Level:**
  - Talk about the goals you initially set up when you signed up for a mentor.
  - Discuss long term career goals in detail and draw a road map to chart your course
  
- **Ongoing Support:**
  - How can you help your mentor?
  - Are there any other organizations that your mentor is a part of that they would recommend you get involved with to you achieve your career goals?
  - How does your mentor stay connected to the news and other professional development opportunities? (e.g. Chronicle of Higher Ed, Movers and Makers, podcasts, Business Courier, AFP webinars, AFP Networking & Knowledge, conferences, etc.)
  
- **Helping Each Other:**
  - Attend an event that each other's agency hosts or attend an event together and make introductions to new people in the room.
  - Mentors show your mentee how to work the room.
  
- **Goal Check-In**
  - Give a progress report on the goals you originally established at the first meeting.
  - Discuss successes, challenges, and opportunities that have come up as a result of tackling these goals.
  
- **Continuing Your Relationship:**
  - Go out and celebrate in December your accomplishments and discuss what your mentoring relationship will look like after December.

# Membership Benefits

## Research and Practice Tools

- AFP Code of Ethical Principles and Standards
- Ethics Assessment Inventory
- International Statement of Ethical Principles
- Promote Donor Bill of Rights
- Fundraising Resource Center
- AFP Website
- Online Fundraising Resource Center
- Hot Topics on Fundraising Issues
- Toolkits (FR in Challenging Times, Job Seekers, New Fundraisers)
- Information Exchange

## Professional Development

- Think Tank Research
  - AFP Compensation and Benefits Study
  - Fundraising Effectiveness Study
  - Nonprofit Research Collaborative Survey
  - Opt in lists communities – Discussion Groups
  - Advancing Philanthropy Magazine – Print
  - Advancing Philanthropy Magazine – Digital
- Please note: Collegiate, Global, Young Professional and Small*

*Organizational members automatically receive the digital magazine only.*

- eWire electronic newsletter
- Ready Reference Series
- Free Webinars
- Email blasts
- Membership Directory
- Consultants and Resource Directory
- Speakers Database
- Professional Job Postings Online
- Mentoring Programs
- Serve on IHQ Committees/Task Forces
- Serve on IHQ Board of Directors
- Strategic Alliance memberships with sister fundraising organizations
- Online Knowledge Portal
- Legislative Activities
- Emerging Fundraisers Academy
- AFP Leadership Academy
- AFP eCourses with MidgEdge
- AFP Fundraising Principles and Practice

## Membership Discounts

- International Fundraising Conference
- AFP Fundamentals of Fundraising
- CFRE Review Course
- Hemispheric Congress
- AFP Webinars
- Nonprofit Management Institute
- Center on Wealth and Philanthropy
- The Giving Institute Consultants Academy
- Faculty Training Academy
- Research Think Tank Registration
- ACFRE Certification
- CFRE Certification
- AFP International Advanced Diploma in Fundraising
- Books
- AFP Merchandise
- NorthPark University
- Tec de Monterrey Diploma Program
- Discounts on products provided by Strategic Partners
- Giving USA
- AFP Graduate Certificate in Philanthropic Fundraising- IU Center on Philanthropy

## Available Chapter Benefits

- Networking
- Member Discounts on Monthly Educational Programs
- Member Discounts on Chapter Conferences
- Member Discounts on National Philanthropy Day events
- Volunteer Opportunities
- Chapter Scholarships
- Chapter Website
- Chapter Newsletter
- Chapter Mentoring Program
- Chapter Job Banks

# CFRE

AFP offers a number of educational opportunities especially for the experienced fundraising practitioner. These opportunities address both the practical skills and theoretical understanding required of advanced-level fundraisers. [Visit the CFRE International website.](#)

## What is the CFRE?

The Certified Fund Raising Executive (CFRE) credential demonstrates an individual's mastery of the standards set for core knowledge and skills required of fundraising executives **after five years** of experience. This practice-based designation requires demonstration of having met these standards through both an application and a written examination.

The Certified Fund Raising Executive (CFRE) credential provides you with a recognizable demonstration of your personal and professional achievement and commitment.



## Who administers/recognizes the CFRE?

The CFRE Program is governed by the CFRE Professional Certification Board. The program and the board is administered in cooperation with leading philanthropic associations:

- Association of Christian Development Professionals (ACDP)
- Association for Healthcare Philanthropy (AHP)
- Association of Fundraising Consultants (AFC)
- Association of Fundraising Professionals (AFP)
- Association of Lutheran Development Executives (ALDE)
- Canadian Association of Gift Planners (CAGP)
- Association Canadienne des Professionnels en dons Planifiés (ACPD)
- Council for Resource Development (CRD)
- Fundraising Institute Australia (FIA)
- Fundraising Institute of New Zealand (FINZ)
- International Catholic Stewardship Council (ICSC)
- National Catholic Development Conference (NCDC)
- North American YMCA Development Organization (NAYDO)
- Philanthropic Services for Institutions (PSI)
- United Way of America

[CFRE Examination Information](#)

[CFRE Website](#) for additional information

The AFP Greater Cincinnati Chapter [offers a scholarship](#) each year.

# ACFRE

## **What is the ACFRE?**

The Advanced Certified Fundraising Executive Program is administered by the ACFRE Professional Certification Board.

Certification as ACFRE requires successful completion of four stages of the process, which must be completed sequentially: a written application, a written examination, a portfolio review, and an oral peer review.

## **What opportunities meet the ACFRE requirements?**

Candidates for [ACFRE Professional Certification](#) should be aware that not all “advanced” or “senior executive” continuing education opportunities are acceptable for the ACFRE application process.

To be eligible, such activities must address one or more specific topics in Advanced Organizational Management or Advanced Organizational Leadership, as described in the ACFRE Application and Guidelines.

## **What criteria do I need to satisfy?**

Those interested in pursuing an ACFRE certification must meet the following criteria:

- Have at least 10 years of experience in professional fundraising.
- Currently have or hope to attain a leadership or managerial role in philanthropy.
- Want to expand their knowledge and understanding of fundraising history, philosophy, and theory beyond a basic level, and/or
- Have identified the ACFRE designation as a career objective.



# A DONOR BILL OF RIGHTS

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## DEVELOPED BY:



Association of Fundraising Professionals (AFP)



Association for Healthcare Philanthropy (AHP)



Council for Advancement and Support of Education (CASE)



Giving Institute: Leading Consultants to Non-Profits

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**PHILANTHROPY** is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

## I

To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

## II

To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.

## III

To have access to the organization's most recent financial statements.

## IV

To be assured their gifts will be used for the purposes for which they were given.

## V

To receive appropriate acknowledgement and recognition.

## VI

To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

## VII

To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

## VIII

To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

## IX

To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

## X

To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.



# CODE OF ETHICAL STANDARDS

## ETHICAL STANDARDS (Adopted 1964; amended Oct 2014)

The Association of Fundraising Professionals believes that ethical behavior fosters the development and growth of fundraising professionals and the fundraising profession and enhances philanthropy and volunteerism. AFP Members recognize their responsibility to ethically generate or support ethical generation of philanthropic support. Violation of the standards may subject the member to disciplinary sanctions as provided in the AFP Ethics Enforcement Procedures. AFP members, both individual and business, agree to abide (and ensure, to the best of their ability, that all members of their staff abide) by the AFP standards.

### PUBLIC TRUST, TRANSPARENCY & CONFLICTS OF INTEREST

#### Members shall:

- not engage in activities that harm the members' organizations, clients or profession or knowingly bring the profession into disrepute.
- not engage in activities that conflict with their fiduciary, ethical and legal obligations to their organizations, clients or profession.
- effectively disclose all potential and actual conflicts of interest; such disclosure does not preclude or imply ethical impropriety.
- not exploit any relationship with a donor, prospect, volunteer, client or employee for the benefit of the members or the members' organizations.
- comply with all applicable local, state, provincial and federal civil and criminal laws.
- recognize their individual boundaries of professional competence.
- present and supply products and/or services honestly and without misrepresentation.
- establish the nature and purpose of any contractual relationship at the outset and be responsive and available to parties before, during and after any sale of materials and/or services.
- never knowingly infringe the intellectual property rights of other parties.
- protect the confidentiality of all privileged information relating to the provider/client relationships.
- never disparage competitors untruthfully.

### SOLICITATION & STEWARDSHIP OF PHILANTHROPIC FUNDS

#### Members shall:

- ensure that all solicitation and communication materials are accurate and correctly reflect their organization's mission and use of solicited funds.
- ensure that donors receive informed, accurate and ethical advice about the value and tax implications of contributions.

- ensure that contributions are used in accordance with donors' intentions.
- ensure proper stewardship of all revenue sources, including timely reports on the use and management of such funds.
- obtain explicit consent by donors before altering the conditions of financial transactions.

### TREATMENT OF CONFIDENTIAL & PROPRIETARY INFORMATION

#### Members shall:

- not disclose privileged or confidential information to unauthorized parties.
- adhere to the principle that all donor and prospect information created by, or on behalf of, an organization or a client is the property of that organization or client.
- give donors and clients the opportunity to have their names removed from lists that are sold to, rented to or exchanged with other organizations.
- when stating fundraising results, use accurate and consistent accounting methods that conform to the relevant guidelines adopted by the appropriate authority.

### COMPENSATION, BONUSES & FINDER'S FEES

#### Members shall:

- not accept compensation or enter into a contract that is based on a percentage of contributions; nor shall members accept finder's fees or contingent fees.
- be permitted to accept performance-based compensation, such as bonuses, only if such bonuses are in accord with prevailing practices within the members' own organizations and are not based on a percentage of contributions.
- neither offer nor accept payments or special considerations for the purpose of influencing the selection of products or services.
- not pay finder's fees, commissions or percentage compensation based on contributions.
- meet the legal requirements for the disbursement of funds if they receive funds on behalf of a donor or client.