

Part 1:
JUMPstarting Your Program



Forming and Maintaining *Partnerships*

Module 4

Time: 2 hours
Limit: 25 participants

Introduction

Session Goals

Participants will explore effective strategies for developing and nurturing partnerships that contribute to fulfilling their program mission and goals. By the end of the workshop, they should:

- Have developed strategies for building relationships with potential partner organizations
- Have examined key elements of an effective partnership
- Be able to write a partnership agreement that articulates goals, roles, and responsibilities

The Basics

1. A partnership must have clear benefits for everyone who is involved in it.
2. In developing relationships with potential partners, focus first on their interests. Identify how your program can help potential partners fulfill their goals.
3. Put the agreement in writing. Informal, oral understandings can be misunderstood when they are made, or can later be re-interpreted by one partner or the other.
4. Regular, ongoing communication is the key to maintaining partnerships.

Agenda

1. **What's In It For Them?** (15 minutes)

Participants describe how an organization would benefit from partnering with their mentoring program.

2. **What's In It For You?** (10 minutes)

Participants identify how their mentoring programs could benefit from a partner.

3. **Building the Relationship** (50 minutes)

Small groups explore approaches to developing relationships with potential partners.

4. **Put It In Writing** (40 minutes)

Small groups develop a written partnership agreement.

5. **Now What?** (5 minutes)

Participants identify ways they can apply information from this session.

Connections to Other Training Sessions

Some of the information and strategies referred to in this session are covered more fully in these JUMP trainings:

- “Targeted Mentor Recruiting”
- “Measuring Outcomes”

If members of your training group have already attended either of those sessions, you may want to draw on information they have learned there. If they have not yet attended those sessions, you will want to, where appropriate, encourage them to attend in order to reinforce and add to the information covered during this training on “Forming and Maintaining Partnerships.”

Preparation

1. Read the handouts. They contain much of the information you need for leading this session.
2. Visit the Web sites listed on Handout #9, “Resources for Forming and Maintaining Partnerships,” so you are prepared to describe to participants the kinds of information they can find there.
3. Review the two curriculum modules, listed on the previous page, that include information and strategies relevant to “Forming and Maintaining Partnerships.”
4. Prepare a set of handouts for each training session participant. (Copy the handout materials onto paper with three-hole punches so participants can keep them in a binder.)
5. Prepare a transparency of the overhead.
6. Copy the goals of the session onto a flipchart. On a separate sheet of flipchart paper, copy the agenda.



Materials

Overhead

- Overhead #1: You Have to Build Relationships

Handouts

- Session Goals and Basics
- Agenda
- Handout #1: Benefits of Partnerships
- Handout #2: Building the Relationship: Developing a Plan
- Handout #3: Getting in the Door
- Handout #4: “Getting In”: Forming Partnerships with Corporations
- Handout #5: “Getting In”: Forming Partnerships with Schools
- Handout #6A: Small-Group Work: Partnering with a Business
- Handout #6B: Small-Group Work: Partnering with a School
- Handout #6C: Small-Group Work: Partnering with a Youth-Serving Agency
- Handout #6D: Small-Group Work: Partnering with a College or University
- Handout #7: Good Practices for Building and Maintaining Partnerships
- Handout #8: Memorandum of Understanding
- Handout #9: Resources for Forming and Maintaining Partnerships

You Will Need To Supply

Flipcharts, easels, markers, and masking tape
An overhead projector

Activities

1. What's In It For Them?

Participants describe how an organization would benefit from partnering with their mentoring program.

- Introduce yourself to the group.

Then have each participant introduce herself or himself and briefly give one reason why an organization, agency, business, or school would want to partner with her/his mentoring program. What would be the benefit for the partner?

As participants speak, record the benefits on a flipchart.

Possible responses include: access to positive role models (mentors) for children and youth the partner serves; access to financial resources; positive image in the community; fulfillment of service requirements for college or university students; fun and rewarding volunteer work for their employees.

Note that this training session is intended to help programs develop plans and strategies for forming and maintaining effective partnerships.

Using the flipchart you have prepared, describe the goals of this training session. Then briefly review the agenda.

- Check to be sure each person has the handouts for this session. Briefly review the table of contents on the cover page of the handouts. Explain that you will be using many of the handouts during the session and that they are also intended to be a resource packet for participants to take back to their programs.



Refer participants to page 1 of their handouts, “Session Goals and Basics.”

Review the four “basics” that are listed there. Note that the second “basic” is to focus on your potential partner’s self-interest as you begin to develop the relationship—and that participants have begun to identify those self-interests in the list of benefits they just generated.

This training session will be examining all four of these “basics” more fully.

2. What's In It For You?

Participants identify how their mentoring programs could benefit from a partner.

- Ask participants to brainstorm a list of organizations, agencies, or businesses with which they are trying (or thinking about trying) to form a partnership. Record their responses on the flipchart.
- Now ask them to brainstorm a list of what they hope to gain from those potential partners. As they speak, again record their responses.

There will probably be a wide range of responses. They might include, for example: more mentors; access to a larger number of children or youth for the program; help in training mentors; access to more services for children or youth in the program.



- Refer participants to Handout #1, “Benefits of Partnerships.” Briefly review with them any “benefits” and “potential partners” listed on the handout that they have not mentioned thus far.

Note that there is also space on the handout for them to add “benefits” and “potential partners,” using the two lists you have just recorded on the flipchart,

3. Building the Relationship

Small groups explore approaches to developing relationships with potential partners.



- Display Overhead #1, “You Have to Build Relationships.”

Tell participants they are going to meet in small groups to develop strategies for building relationships and forming the kinds of partnerships they have just been discussing.

Explain that they should choose which group they want to be in. Each group will focus on forming a partnership with one type of organization:

1. A corporation
2. A school
3. A youth-serving agency
4. A college

The small groups will be meeting twice during this training session, and participants will remain in the same group for both meetings.

Organize participants into small groups of 4 to 6 people, based on their choice of which group they want to be in. If many people want to focus on one type of organization (that would most likely be schools or businesses), organize them into two small groups. For example, if 11 people want to focus on building partnerships with schools, organize a group of 5 and a group of 6.

(You might end up without a group for one or more types of organizations. For example, there may be only one person, or nobody, interested in focusing on “other youth-serving agencies.” That is not a problem. What is most important is that people join the small group that is most relevant to their interests in partnerships.)



- Refer participants to Handout #2, “Building the Relationship: Developing a Plan,” which describes the process for their small-group meeting. Briefly review it with them.



Make sure participants understand which of the other handouts they will be working with in their groups. Refer them to the table of contents for the set of handouts. Note that each group should begin by quickly reading and discussing Handout #3, “Getting in the Door.”

Each group will also be using one of the four versions of Handout #6—each version contains a description of an organization.



1. The group(s) focusing on forming a partnership with a corporation will use Handout #6A, “Small-Group Work: Partnering with a Business.” This group should also read Handout #4, “‘Getting In’: Forming Partnerships with Corporations.”



2. The group(s) focusing on forming a partnership with a school will use Handout #6B, “Small-Group Work: Partnering with a School.” This group should also read Handout #5, “‘Getting In’: Forming Partnerships with Schools.”



3. The group(s) focusing on forming a partnership with a youth-serving agency will use Handout #6C, “Small-Group Work: Partnering with a Youth-Serving Agency.”
4. The group(s) focusing on forming a partnership with a college will use Handout #6D, “Small-Group Work: Partnering with a College or University.”

- Tell each small group to select a leader and a recorder/reporter, who will report out later to the full group of participants.

Make sure each group has a flipchart, easel, and markers.

Allow 25 minutes for the small groups to complete their work. (Give a “5-minute warning” after 20 minutes so the groups know they have to begin to wrap-up.)

- Have each small group report out to the whole group on the plan it has developed for building a relationship with the potential partner.

Allow time for feedback after each presentation.

4. Put It In Writing

Small groups develop a written partnership agreement.

- Ask, “Now what?” Once you have made the initial contacts and begun to form a relationship, how do you proceed in the process of forging a partnership?



Refer participants to Handout #7, “Good Practices for Building and Maintaining Partnerships.” Briefly review items 1 to 11 under the subhead “Building the Partnership.” As you do, emphasize the need for the potential partners to have clear, agreed-upon expectations.

Ask if anyone has items to add to the “Building the Partnership” section.

For now, do not discuss item #12, having a written partnership agreement. Note that you will be talking about it in a few minutes.

Briefly review the items under the subheads, “Maintaining the Partnership” and “Some Special Considerations for Maintaining Partnerships with Schools.” As you do, emphasize the need for ongoing communications with your partner and joint problem solving.

Ask if anyone has items to add to these two sections.

- Ask, “What are some of the problems that can arise during a partnership?” Have participants brainstorm a list of responses. As they speak, record the “problems” on the flipchart.

Possible responses include: a partner not understanding its responsibilities; a partner not following through; a key person in the partner organization leaving.

Emphasize the importance of having a written agreement that describes the goals, roles, and responsibilities in the partnership. (This is item #12 on the handout.) It is impossible to anticipate every problem, but clear guidelines and procedures can help your partnership avoid many potential pitfalls and unnecessary confusion. A written agreement also serves as a useful document for the partners to refer back to when misunderstandings occur about roles and responsibilities.



- Refer participants to Handout #8, “Memorandum of Understanding.” Tell them that in a minute, they are going to return to their small groups to develop a written partnership agreement.

Briefly review the handout, having participants give an example or two for each item. As they do, they should keep in mind the “good practices” they have just discussed for forming and maintaining partnerships.

- Have the small groups reconvene. Ask them to use Handout #8 to write a partnership agreement with the organization/ school/business they were “forming a relationship with” during their previous small-group meeting. They should feel free to modify the categories on the handout.

Make sure each small group has a flipchart, easel, and markers.

Allow 20 minutes for the small groups to complete their work. (Give a “5-minute warning” after 15 minutes so the groups know they have to begin to wrap-up.)

- Have each small group report out to the whole group on the “memorandum of understanding” it has written.

Allow time for feedback after each presentation.

5. Now What?

Participants identify ways they can apply information from this session.

- Ask for 2 or 3 people to talk about their “next steps.” When they return to their programs, what actions will they take in connection with forming a new partnership or nurturing a current one?
- Refer participants to Handout #9, “Resources for Forming and Maintaining Partnerships,” and briefly review it. Note that two of the resources (*Mentoring: A Synthesis of P/PV’s Research: 1988-1995*, and *School-Based Mentoring: A First Look Into Its Potential*) have information about recent research on the positive effects of mentoring. This information could be useful when talking to potential partners.





**You have to build
relationships first—
you can't just walk into
people's offices and tell
them what to do.**

—A Program Director



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Forming and Maintaining *Partnerships*



Session Goals

- To develop strategies for building relationships with potential partner organizations
- To examine key elements of an effective partnership
- To be able to write a partnership agreement that articulates goals, roles, and responsibilities

The Basics

1. A partnership must have clear benefits for everyone who is involved in it.
2. In developing relationships with potential partners, focus first on their interests. Identify how your program can help potential partners fulfill their goals.
3. Put the agreement in writing. Informal, oral understandings can be misunderstood when they are made, or can later be re-interpreted by one partner or the other.
4. Regular, ongoing communication is the key to maintaining partnerships.



Agenda

1. What's In It For Them?

Notes: _____

2. What's In It For You?

Notes: _____

3. Building the Relationship

Notes: _____

4. Put It In Writing

Notes: _____

5. Now What?

Notes: _____



Benefits of Partnerships

Strategically formed partnerships have a number of potential benefits for mentoring programs. These benefits include:

- Access to potential mentors
- Access to potential program participants
- Access to space for your program
- Increased access to resources, including more services for program participants
- Enriched programming for participants, such as free tickets to events or job shadowing opportunities
- Increased organizational capacity to manage your program and its volunteer mentors
- Access to expertise in particular areas, such as training mentors, and planning and conducting evaluations to measure outcomes for youth in your program
- Ability to establish joint projects
- Ability to provide forums where information can be shared
- Other:
- Other:

Potential partners include:

- Schools
- Social service and youth-serving agencies
- Colleges and universities
- Local businesses and corporations
- Organizations for special groups, such as the American Association of Retired Persons
- Arts and cultural institutions
- Other:
- Other:



Building the Relationship: Developing a Plan

Your small group should select a group leader and a recorder/reporter. The group leader will guide you through the following steps.

I. Read Handout #3, “Getting in the Door.”

(If your group is working on forming partnerships with corporations or schools, also read the additional relevant Handout #4, “‘Getting In’: Forming Partnerships with Corporations,” or #5, “‘Getting In’: Forming Partnerships with Schools.”) Have a brief discussion about the strategies included on the handout(s). Focus on which of these strategies you have tried, successes you have had with them, and challenges you have met. Also suggest additional strategies you have used in order to “get in the door.”

II. Read the version of Handout #6 that is relevant to your group.

Using the information on the handout as background, your group should discuss the following issues. (Be sure someone takes good notes because your small group will be making a presentation about your decisions to the full group. In addition, later during this training, you will be using the decisions you make now as the basis for writing a partnership agreement.)

- 1. Why do you want to form a partnership with this organization/school/business?** What is the potential benefit for your mentoring program?
- 2. Why would this organization/school/business want to partner with you?** What is the potential benefit for them?
- 3. Develop a plan for building a relationship with this organization/school/ business.** For example:
 - What is your strategy for “getting in the door”?
 - During your early contacts with the potential partner, is there any additional information you want to get about the organization/school/business that could help you plan your approach for developing a partnership?
 - What can you offer? How do you fit in to the potential partner’s interests? How are you going to “sell” the idea of a partnership to them?

Building the Relationship: Developing a Plan
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- 4. Be prepared to give a brief presentation (maximum of 5 minutes) to the full group about your plan for developing a partnership with this organization/ school/business.** You may want to introduce the plan by describing the important characteristics of the organization/school/business with which you are trying to partner.



Getting in the Door

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In an informal survey of over 40 mentoring program directors and staff, the following points emerged as key strategies for “getting in the door” and beginning to develop relationships with potential partners.

1. Network your way in the door.

- Identify and make use of good sources of networking, such as the Chamber of Commerce and United Way.
- Attend community meetings. Set a goal of communicating with at least one new contact person at every meeting.
- Participate in a range of advisory committees or associations. Check local newspapers and “surf” the Internet to find out what is going on around the city. Then call and ask to be invited.
- Involve your entire staff in these networking efforts. When anyone on the staff has an opportunity to sit on a committee, encourage her or him to grab that opportunity. This not only leads to forming relationships with potential partners; it also helps your organization develop a reputation as the “expert” on certain issues.
- Form partnerships “slowly and socially.” Instead of an initial formal presentation, invite potential partners to lunch or speak with them at an event. Set up a formal meeting only after you have had these more “social” contacts.
- Help out the potential partner with its own “pet projects.” One program, for example, has been trying to recruit mentors from a large corporation. The CEO is interested in the program, but no one else in the company is paying much attention. The company’s current volunteer focus is on Junior Achievement, so the mentoring program director is helping out with that in order to make contacts and build good will.

2. Arm yourself with information.

- Learn about the business, school, or organization you are interested in partnering with. For example, find out what kinds of volunteer or philanthropic activities the corporation wants to become involved in, and read its annual reports. Learn about the current conditions, initiatives, and goals of the school. Read the nonprofit agency’s newsletters. Identify how you can “fit in” to the potential partner’s current interests.

- Be prepared to talk about the proven benefits of mentoring. Become familiar with some of the national research on mentoring programs. (The last section of the handout provides some findings from evaluations of mentoring programs around the country.) Use local statistics to demonstrate the need for mentoring in your community.
- Be prepared to talk about how your particular program benefits youth and strengthens the community. Be ready to discuss your program's goals and the findings from any evaluations that have been conducted of your program.

3. Focus on your audience—the potential partner.

- Be sure you have something to “put on the plate” when you introduce the idea of a partnership. If possible, also be prepared to put money into the partnership. As more than one program director emphasizes, “Money talks.”
- Be prepared to “custom design” the partnership. Make it clear that you are flexible and willing to compromise.

4. Make a strong formal presentation to the organization or business.

- Before the presentation, think through your own “selling points.” For example:
 - Do you have staff, volunteers, or board members with connections to that organization or business?
 - What can you do for that organization or business—how can you help it meet its goals?
 - What successes has your program had to date?
- Be clear with yourself about your goal for this presentation. Is the goal to begin to build respect and trust? To identify common interests? To discuss concrete possibilities for the partnership?
- Be sensitive about who is representing your program at the presentation. For example, if you are trying to partner with a community organization in order to improve your ability to recruit mentors from a particular racial or ethnic group, try to have staff or mentors present who are representative of that organization's membership.
- Be very specific about what you are asking your potential partner to do.

- Do not make a presentation until you are ready to make a *strong* presentation. An ineffective presentation could result in permanently “losing” that organization/ business as a potential partner.

5. Be persistent.

- Follow-up. The person representing the potential partner might say all the right things when you meet, but then not follow through. Take the responsibility, in a low-key way, for keeping the conversation moving along. For example, after a meeting, write a memo describing what each of you agreed to do.
- Promptly complete any tasks you have promised to do. For example, if you have an initial discussion with a potential partner and say you will send information about your program, do so immediately.
- Make yourself totally available. One program director calls the process of forming a partnership “a constant PR campaign.”

Some Research Findings on Mentoring

The studies cited below demonstrate the positive impact that mentoring can have on young people. This information should be useful when you have discussions with potential partners about the proven benefits of well-structured mentoring programs.

1. A 1995 study of Big Brothers Big Sisters of America, conducted by Public/Private Ventures, showed that young people with mentors were:
 - 46 percent less likely to begin using illegal drugs than were youth in the research control group, who were not matched with a mentor
 - 27 percent less likely to begin using alcohol
 - 52 percent less likely to skip school
 - 32 percent less likely to hit someone
2. A 1996 study from the Center for Intergenerational Learning at Temple University showed that young people who participated in Across Ages, an intergenerational mentoring project for high-risk middle-school students in Philadelphia, exhibited:
 - Less negative, disruptive classroom behavior
 - Better school attendance

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- Improved relationships with adults and peers
 - Positive changes in their knowledge, attitudes, and behaviors concerning substance use and related life skills
3. A 1993 Partners for Youth study revealed that, of 200 nonviolent juvenile offenders who participated in a mentoring relationship under the sponsorship of Big Sisters of Central Indiana, nearly 80 percent avoided re-arrest.
 4. The Quantum Opportunities Program, funded by The Ford Foundation from 1989 to 1991, focused on high school students whose families were receiving public assistance. The students who had mentors were more likely than those who did not to:
 - Graduate from high school
 - Become involved in community service
 - Have fewer arrests
 - Enroll in college
 - Be hopeful about their future



“Getting In”: *Forming Partnerships with Corporations*

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Building relationships is a key factor in developing effective partnerships with corporations—and you can lay the groundwork for building those relationships by doing a little research. Community relations managers for corporations advise nonprofit agencies to learn about a corporation’s volunteer interests, policies, procedures, and levels of involvement before approaching it.

Their recommendations include:

- 1. Learn what kinds of issues the corporation’s employee volunteers are currently involved in.** They might, for example, be focusing their efforts on education or environmental issues, on children, youth, or the elderly.
- 2. Learn how the corporation’s volunteer efforts are organized.** Corporate employee volunteer programs generally fall into two broad categories:
 - Corporate-sponsored volunteer programs are essentially top-down programs, with varying levels of internal support. The corporation might simply promote volunteering by posting opportunities. Or it might actively encourage volunteering through, for example, group projects and recognition of volunteers. It might also sponsor volunteer efforts through financial support, including paid time off that employees use in volunteer activities. Nonprofit agencies that want to connect with a corporate-sponsored volunteer program could begin by connecting with a manager in the corporation’s community relations or public affairs department.
 - Employee-driven volunteer programs are essentially bottom-up programs. Employees determine priorities and choose volunteer projects, while the company’s role is to promote, support, and recognize the efforts of its employees. Nonprofits that wish to develop relationships with employee-driven programs should start by connecting with interested employees and allow them to build the internal support in the corporation.
- 3. Decide whether there is a good fit between your agency’s mission and goals and the priorities, policies, and procedures of the corporation.** If there is not, it is probably a good idea to begin looking for a different corporate partner.
- 4. Establish a personal contact.** Then start building the relationship.
- 5. Be concise and clear about your request.** Identify how many volunteers are needed, what they will be doing, if particular skills are needed to do the work,

“Getting In”: Forming Partnerships with Corporations
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where and when the work will be done, how frequently employees will be expected to volunteer, and the length of commitment expected.

6. Be prepared to talk about the benefits to the employees and the corporation. Corporate volunteers are looking for the opportunity to make meaningful contributions to the community, and corporations and their employees are increasingly interested in the impact their contributions will have on the clients served. In addition, corporations benefit from their employees' volunteer activities in a number of ways. These include:

- An enhanced reputation in the community
- Increased employee morale and loyalty to the company
- Increased employee job satisfaction

The following section provides findings from a recent survey about corporate volunteerism. You can use this information to help you plan effective strategies for approaching a corporation about becoming involved in your mentoring program.

Corporate Volunteerism: Results of a Survey

A recent study by the Points of Light Foundation reveals the dramatic changes that have been occurring in the world of corporate employee volunteer programs. *Corporate Volunteer Programs—A Strategic Resource: The Link Grows Stronger*, published in 1999, is a follow-up to a 1992 study that established benchmark data in the emerging field of corporate employee volunteer programs. The new report tracks changes and identifies trends, opportunities, and challenges for these programs.

The survey, funded by the Allstate Foundation, was mailed to 2,772 U.S. corporations in the spring of 1999. Of those companies, 248, or 9 percent, responded. They represent a cross section of American business by geographic location; industry sector; years in business; and size, as measured by number of employees and annual revenues.

According to results of the survey, employee volunteer programs are no longer viewed as isolated company activities. In fact, they are often considered an integral part of a company's core business functions. Corporate America is now placing a greater value on employee volunteer programs as a resource for achieving strategic

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business goals. The findings show a significant trend toward incorporating volunteer programs into overall business plans and corporate mission statements; implementing them with more professional, skilled staff; and evaluating their effectiveness.

The survey results also show that employee volunteer programs provide benefits to the company, the employee, and the community. Respondents unanimously agreed that corporate volunteering helps create healthier communities and improves a company’s public image. In addition, 97 percent say their volunteer programs improve employee teamwork.

Other survey highlights include:

- 81 percent of companies connect volunteering to their overall business strategies (that figure was only 31 percent when the original survey was conducted seven years ago)
- 28 percent of the companies who are not using their volunteer programs strategically believe they should do so
- 83 percent connect their volunteer programs to the company’s public relations activities
- 64 percent tie the programs into their marketing and communications efforts
- 60 percent use volunteer initiatives as a way to develop employee skills
- 58 percent tie the efforts into human resources policies and employee retention

The survey also indicates that more companies are connecting their philanthropic and volunteer efforts—encouraging employees to volunteer for the same programs and organizations to which the company is donating money—in order to strengthen the impact of both initiatives in the community. The issue areas that receive the most support from the business sector are education, health and human services, and youth.

Companies expect their employee volunteer programs to show results. It has become standard for them to perform evaluations. The survey found that:

- 70 percent of the companies report they have a tracking system to measure benefits to the company, the community, and the employee
- 73 percent track the number of participating employees
- 78 percent collect data on the number of volunteer hours

“Getting In”: Forming Partnerships with Corporations
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And, importantly, the survey demonstrates that employees respond to opportunities to volunteer with their companies:

- 20 percent of companies reported that more than half their employees participate in volunteer programs
- 38 percent say that between 20 and 40 percent of their employees participate in those efforts

While corporate volunteerism clearly has substantial potential to be a powerful force in the community, challenges remain. Companies with fewer than 500 employees often have less of a commitment to employee volunteer efforts. Thus, nonprofit organizations may have to make extra efforts to convince these companies of the value of employee volunteer programs.



“Getting In”: Forming Partnerships with Schools

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In its Spectrum of Service (SOS) demonstration project, funded by The Ford Foundation, Public/Private Ventures is working with seven sites around the country that provide tutoring or mentoring for children and youth, primarily in school settings. While the project is specifically looking at ways that volunteers and paid national service providers can unite their efforts in supporting children and youth, many of its “lessons” are applicable to a wide range of programs. This handout presents SOS findings about effective strategies for forming partnerships with schools.

Working effectively as an outsider in a school setting, regardless of your program’s content or format, requires a solid plan and the capacity to communicate it to administrators, teachers, and other school personnel. The SOS sites have identified the following effective strategies for initiating partnerships with schools.

1. Show how your program will help achieve existing educational objectives.

Prior to approaching the schools with whom they sought to work, the SOS sites identified the ways their programs could contribute to existing educational plans or priorities. The sites articulated this “fit” on several administrative and operational levels, from state departments of education to individual school buildings:

At the state level. An SOS site in Providence, Rhode Island, a state that has devoted considerable time and resources to educational reform, has positioned itself as part of the larger statewide effort to enhance educational outcomes for children and youth.

At the district level. An SOS site in San Francisco has gotten buy-in from schools because it was able to demonstrate how its program helped improve literacy rates among public school students, a school district priority.

At the school level. When a program’s objectives align with school-level goals, outside providers are more likely to be attractive to school administrators. SOS sites have been successful in forming strong partnerships with individual schools when they have been able to demonstrate that their services will help the school achieve its desired student outcomes. In Philadelphia, for example, a reading specialist explained why she values the SOS volunteers who tutor and mentor children at her school: “[The program] knew our feelings as far as literacy is concerned. We have made a big investment in our new reading initiative, and this provides us with extra support.”

2. Take advantage of existing institutional relationships to access school partners.

Some of the SOS sites have taken advantage of existing partnerships with other youth-serving agencies to gain access to schools. For example, an SOS program in the Boston area capitalized on its partnership with a YMCA. That agency had developed relationships with school principals, which, in turn, helped to open doors for the SOS program.

3. Find a “champion.”

The SOS sites have used a number of strategies to ensure that school administrators and teachers are amenable to their programs and comfortable with their presence. One effective approach has been to find a key supporter, respected in the schools, who will promote the program to school personnel. In Boston, San Francisco, and elsewhere, principals who have previously had positive experiences with similar programs have been effective ambassadors, espousing the potential benefits to the rest of their staff. Before the SOS program in Providence started operations, the city’s Assistant Superintendent of Schools brought together all the middle-school principals to explain the soundness of the program’s approach. His support, which was based on the reputation of similar programs elsewhere, gained the SOS site a measure of legitimacy even before its local implementation.

4. Be clear up-front about programmatic processes, objectives, and expectations.

All the SOS sites have devoted significant time to providing program information and materials to prospective school partners. One site lays the groundwork for the program through an extensive process that includes the development of a written plan and visits to the school by program staff. As a result, programmatic goals and objectives, as well as each partner’s roles and responsibilities, are clear to all involved. A second site meets with school personnel the summer prior to program implementation to discuss what the program seeks to accomplish and to work out the responsibilities of each player. Other SOS sites also meet with the school principal and all the teachers whose students will be tutored or mentored to explain not only the program’s structure and content, but also the recruitment and training process for the volunteers who will be working with the children.

(Adapted from *Combining Paid Service and Volunteerism: Strategies for Effective Practice in School Settings*. August 1999. Kathryn Furano and Corina Chavez. Philadelphia: Public/Private Ventures.)



Small-Group Work: Partnering with a Business

Your mentoring program serves youth ages 10 to 15. Most of the mentors you have recruited thus far live in the community. However, you have a long waiting list of youth who have applied to be matched with a mentor, and you need to expand your mentor recruitment efforts. You have identified two corporations (described below) that have geographical ties to the community your program is targeting.

Before your small group begins to address the questions on Handout #2, “Building the Relationship: Developing a Plan,” decide which of these corporations you are going to approach. (When you make your presentation to the full group at the end of this activity, include an explanation of why you decided on that corporation.) You may decide you want to approach both businesses. If so, as you address the items on Handout #2, consider how these approaches might be different for each of the corporations.

You have not yet contacted anyone in either of these corporations, but you have collected the following background information.

1. Federation Bank

Two years ago, Federation Bank, which has offices throughout the East Coast, took over a major Philadelphia bank that had been an important source of financial contributions to nonprofit organizations in the area. Local government officials and citizens were unhappy about the takeover and concerned about the loss of an important local institution. In response, Federation promised that it would contribute significantly to the community.

You know that the national headquarters of the corporation has made a public commitment to employee volunteerism. In fact, a recent issue of Federation Bank’s national newsletter included an article about its corporate volunteerism. The article included these points:

- “What’s the measure of a truly successful corporation? Federation believes that a corporation can call itself truly successful only when it makes more than an economic contribution to its community.”
- Through spring 1999, Federation employees across all of the corporation’s locations completed 1.8 million hours of volunteer work as part of the bank’s pledge to the 1997 President’s Summit for America’s Future. That commitment has been raised to 2.5 millions hours through the end of 2001.

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- The director of community relations at Federation’s national headquarters calls the corporation’s employee volunteer activities “a grassroots effort that requires the support of key managers.” Managers can allow employees up to four hours of paid time off each month to volunteer in local schools and in programs such as Junior Achievement.
- Federation believes that volunteerism “builds employee morale and customer loyalty. The general public is more inclined to do business with a company that is socially responsible. And if you are competing with another firm to land a major business-to-business account, your track record in community involvement might give you the edge, all else being equal.”

However, the feeling around Philadelphia is that, thus far, Federation has not entirely carried through on its promise to the city. The corporation’s expansion into the Philadelphia region has been less profitable than it had projected, and it has closed some of the bank’s branches and laid off workers. There has also been a lot of turnover, particularly among middle managers and senior managers. With its inward focus on strengthening its own profitability, Federation has spent less time and fewer resources on contributing to Philadelphia than people had hoped it would. Federation has two branch offices in the community targeted by your program. It is also a major lender to small businesses located in the community.

2. *Genesis Enterprises*

Genesis, with 1,800 employees, is one of the East Coast’s major wholesale distributors of pharmaceuticals and related health care products. It supplies more than 11,000 health care providers with products that range from blood plasma to bandages. The company’s headquarters are located in a suburb about 15 miles outside of Philadelphia, but its major distribution center is less than a mile from your agency’s office.

Genesis is a 17-year-old company with no real history of community involvement, although it has occasionally given corporate support to local efforts, such as the annual Philadelphia AIDS Walk that raises money for nonprofits serving people with HIV. However, the company recently named a new CEO, a 52-year-old woman who grew up in a poor neighborhood in Philadelphia. Last week, you read an article about her in the business section of the *Philadelphia Inquirer*. She spoke

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about her plans to expand the company and about her commitment to Philadelphia. “As a business that has made Philadelphia its home,” she said in the article, “we have a responsibility to help make this a better place for children to grow up. I am committed to having Genesis become involved in strengthening communities.”



Small-Group Work: Partnering with a School

Your mentoring program is targeting youth ages 10 to 15 who live in southwest Philadelphia. Many of these youth attend the Polk Middle School, which includes grades 5 to 8. Polk has the following mission statement:

“We believe that all students must be given every opportunity to acquire basic skills and knowledge so that they will be capable of functioning in a technological society which will require the sharing of ideas and group decision making. The Polk School Community is dedicated to fostering a learning environment which will promote achievement, clarify values, enhance global understanding, and encourage service.”

You need to establish a strong partnership with Polk. You have not, as yet, had any contact with the school, but you know that a new principal started there last year, and she has a good reputation.

You have obtained this information from the Philadelphia School District’s Web site. The information is based on Polk’s 1997-98 academic year.

I. Student Enrollment

% by Gender		Total	Native American	African American	Asian	Latino	White
	Male	305	0	303	1	0	1
	Female	327	0	327	0	0	0
	Total	632	0	630	1	0	1
% by Ethnicity			0	99.6	0.2	0	0.2

II. Student Population Characteristics

1. Percentage of students from low-income families: 95 percent
2. Average daily attendance: 83.9 percent
3. Number of students who served out-of-school suspensions: 176
4. Total number of out-of-school suspensions: 390

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III. Academic Performance in School: Percent of Students with Marks of “C” or Better for the School Year

Grade	5	6	7	8
Language Arts/English	68.5	62.8	71.2	66.0
Social Studies	74.0	69.5	64.5	61.3
Math	71.3	60.1	71.1	50.5
Science	80.8	66.5	63.4	52.1

IV. Student Performance on the Comprehensive Test of Basic Skills, A National Standardized Test

A. Mathematics: Percent of the School’s Students in Each Quartile

(Each quartile represents one-quarter of the national student performance distribution.)

Grade	5	6	7	8
4th (bottom) quartile	61.0	70.0	63.0	65.0
3rd quartile	21.0	23.0	26.0	22.0
2nd quartile	12.0	6.0	10.0	8.0
1st (top) quartile	6.0	1.0	1.0	5.0

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B. Reading: Percent of the School's Students in Each Quartile

(Each quartile represents one-quarter of the national student performance distribution.)

Grade	5	6	7	8
4th (bottom) quartile	65.0	78.0	48.0	47.0
3rd quartile	21.0	19.0	35.0	27.0
2nd quartile	10.0	3.0	12.0	15.0
1st (top) quartile	4.0	0.0	5.0	11.0

V. School Programs and Activities

Enrichment Programs—Choir, Instrumental Music, Magellan College Tutoring Program, Junior Achievement, Peer Mediators, Reading Buddies, School Store, Student Government

After-School Activities—Charm Class, Chess Club, Computer Club, Dance Ensemble, Mural Art, Tutoring (in all subject areas), Yearbook, United Way After-School Program

Sports—Basketball (boys and girls), Cheerleading, Soccer, Softball, Track, Volleyball

VI. Students Give Their Opinions About Our School

(This student writing appears on the Polk Middle School Web site.)

What I Think About Polk

By Tamika H., Section 804, Age 13

I think that Polk is a nice school. They have teachers that are ready to teach you. It is clean. Most people are nice to you. The thing that needs improvement are that people need to stop eating seeds and spitting them out.

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Polk School

By Torrance S., Section 805, Age 13

The things I like about Polk are making things out of wood in Wood Shop. I also like cooking things like cookies in Home Economics. I like being in Gym because it's the easiest class to pass. Plus, I like learning because it's helping me get ready for the real world.

What I Think About My School

By Nikki K., Section 805, Age 13

I think my school is great. The teachers here are nice and they are neat. People here are somewhat respectful to each other. The teachers don't play around when it comes down to your education. As Ms. Summit says, "I laugh and I joke, but I do not play around when it comes to your education." That's what I like about Polk. I really don't have anything to dislike about this school.

My Article About Polk

By Latoya F., Section 804, Age 12

At Polk Middle School, there need to be some improvements like new bathrooms in the basement and a new gymnasium. Also, we need a better auditorium with better seats and stage. That's what should be done.

VII. Where Do Students Go After They Graduate From the 8th Grade At Polk?

Students who do well at Polk may be able to attend high school at one of the Philadelphia School District's "magnet schools" that are located around the city. These are reasonably good schools, and a majority of their graduates go on to college.

Most Polk students, however, move on to 9th grade at nearby Bradford High School, which many people consider to be the worst school in the city. Students at Bradford consistently score the lowest among the city's high schools on standardized tests. Virtually none go on to college. Bradford's average daily attendance is only 52.6 percent. Almost 62 percent of its 762 students served out-of-school suspensions at some point during the past school year. Its annual official dropout rate is more than 12 percent, although the actual rate is much higher.



Small-Group Work: ***Partnering with a Youth-Serving Agency***

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Your mentoring program is targeting youth ages 10 to 15 who live in an area of Philadelphia that includes the communities of Germantown, Nicetown, and Wissahickon. The Boys & Girls Clubs of Metropolitan Philadelphia, Inc., have well-respected programs in those communities, and you know it is important to form a partnership with them.

You have not yet met anyone from the organization, but you have obtained this information about the Philadelphia Boys & Girls Clubs from their Web site.

Boys & Girls Clubs of Metropolitan Philadelphia:

- Welcome all young people ages 5 to 18
- Have membership dues that average \$7.50 a year
- Have an “open door” policy for all members at any time during hours of operation
- Have various programs that respond to collective and individual needs
- Help girls and boys make appropriate and satisfying choices

Mission

Our mission is to help all children and youth, but especially those who live in disadvantaged circumstances, to develop the qualities they need to become responsible, productive citizens and leaders.

Three characteristics distinguish our clubs from other youth-serving organizations:

- 1. Full-time professional leadership**, supplemented by part-time staff and volunteers
- 2. Accessibility**—clubs are open to all members, Monday through Friday, throughout the year, with special Saturday activities during the school year
- 3. Building centered**—activities are carried out in the warm, friendly atmosphere of buildings designed to conduct youth development programs

Programs

Our programs incorporate a youth development strategy that instills in each child feelings of **competence**, **usefulness**, **belonging**, and **influence**. Activities are developmentally appropriate and structured around six core program areas:

- Personal and educational development
- Cultural enrichment

Small-Group Work: Partnering with a Youth-Serving Agency
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- Citizenship and leadership development
- Social recreation
- Health and physical education
- Outdoor and environmental education

Each of our six sites is licensed as a child care center by the Commonwealth of Pennsylvania, Department of Public Welfare. After-school care and full-day summer camp programs are available.

Our club locations are:

Bridesburg Boys & Girls Club

Bridge and Garden Streets
Philadelphia, PA 19137
Tel: 215/743-7755

Germantown Boys & Girls Club

25 West Penn Street
Philadelphia, PA 19144
Tel: 215/844-7771

Frankford Boys & Girls Club

1709 Kinsey Street
Philadelphia, PA 19124
Tel: 215/743-7515

Nicetown Boys & Girls Club

18th and Hunting Park Avenue
Philadelphia, PA 19140
Tel: 215/229-8900

and

4223 Wayne Avenue
Philadelphia, PA 19140
Tel: 215/324-6433

Wissahickon Boys & Girls Club

328 West Coulter Street
Philadelphia, PA 19144
Tel: 215/438-7394

History

Boys & Girls Clubs of Metropolitan Philadelphia is part of a national affiliation of Boys & Girls Clubs of America and 1,725 local, autonomous organizations that collectively serve more than 2.2 million members. We are the consolidation of previously independent clubs which have operated under a single governing board since 1974. Our oldest club, Germantown, dates back to 1887.

The Nicetown unit is the only charter member of Boys & Girls Clubs of America that has served girls from its inception. The Wissahickon club was the first in the country established to serve an African American community. These three clubs were among the 52 organizations that chartered Boys & Girls Clubs of America in 1906. Our two remaining units, the Frankford and Bridesburg clubs, were founded in 1948 and 1951, respectively.



Small-Group Work: ***Partnering with a College or University***

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Your mentoring program serves youth ages 10 to 15. Most of the mentors you have recruited thus far are adults who live in the community. However, you have a long waiting list of youth who have applied to be matched with a mentor, and you need to expand your mentor recruitment efforts. You are particularly interested in recruiting mentors from one or more of the colleges in Philadelphia. You believe that college students, because they are closer to the youth's ages, could be especially effective as mentors and role models. There are two colleges that, for different reasons, you are interested in approaching.

Before your small group begins to address the questions on Handout #2, "Building the Relationship: Developing a Plan," decide which of these colleges you are going to approach. (When you make your presentation to the full group at the end of this activity, include an explanation of why you decided on that college.) You may decide you want to approach both colleges. If so, as you address the items on Handout #2, consider how these approaches might be different for each of the colleges.

You have not yet contacted anyone in either of these colleges, but you have collected the following background information.

1. Magellan University

Magellan, founded in 1870, is located in northwest Philadelphia, ten miles from the community your mentoring program targets. Magellan has about 3,000 students, more than half of whom commute to the university.

Magellan has a long history of community involvement, and most of its efforts are focused on the community where it is located, an historically significant but economically troubled section of the city. During the past few years, Magellan's community involvement has increased significantly because the university received a Learn and Serve America grant from the Corporation for National Service. With this grant, Magellan established the Center for Learning in the Community, which is staffed by a full-time director and part-time student coordinators. The Center's goals are to:

- Provide diverse community service opportunities for Magellan's students, faculty, and staff
- Challenge members of Magellan University to overcome biases and stereotypes
- Provide community service projects that work toward social change

Small-Group Work: Partnering with a College or University
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- Provide opportunities for leadership development among Magellan students
- Establish true partnerships with the community of which Magellan is a part

Magellan's students, faculty, and staff are engaged in a number of community service projects, and many of these involve working with children and youth. Among the initiatives are:

- A partnership with a nearby elementary school. Magellan students provide a structured recess program and after-school services that include tutoring, mentoring, and creative writing and ecology clubs.
- A partnership with a nearby high school. Magellan students tutor and mentor the high school students and provide college counseling and life skills instruction.
- A partnership with Philadelphia's Department of Human Services. Magellan students and staff tutor and mentor children from the community who are in foster care.
- A program that provides one-to-one homework and tutoring help for neighborhood children and youth. The program takes place on the Magellan campus.

These and other community service initiatives at Magellan take place both as part of students' academic course work and as extra-curricular activities.

2. St. John's University

Founded in 1911, St. John's University is a Catholic Jesuit institution located just outside the community targeted by your mentoring program. The majority of its 1,200 students live on campus. The college has more than 50 student-run clubs and organizations, including academic and social clubs, sports clubs, and arts organizations.

The college does not have an official philosophy or policy about community service, and there is no central office that promotes or organizes community involvement for the students. However, among the student clubs and organizations, there are six that focus on community service. Two of these clubs provide tutoring to children and youth in nearby schools. None of the clubs is involved in mentoring.



Good Practices for Building and Maintaining Partnerships

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Effective partnerships must be based on trust. This does not mean that both partners have the same mission, but that each of you trusts the other to do what the partnership requires. Practitioners across a wide range of programs have identified the following practices as essential for developing trust, and building and nurturing partnerships.

Building the Partnership

- 1. Be clear about your interests and your partner's interests—those interests are often not the same.** Make the case for a partnership based on your prospective partner's interests, not yours.
- 2. Be alert to potential “turf issues.”** These could include conflicting work styles; different “languages” (for example, different groups of professionals speaking in their own jargon); and apparently separate priorities.
- 3. Agree on the goals of the partnership.** Start small and build gradually. Don't ask for, or offer, too much until the working relationship is running smoothly and lines of communication are comfortable and effective.
- 4. Identify who is responsible for what tasks.** The nature of those responsibilities will naturally vary, depending on the goals of the partnership. They might include, for example, responsibility for recruiting mentors, matching mentors and youth, training mentors, supervising mentors, providing publicity in connection with the program or with an event, providing transportation, providing materials for mentors to use when they are meeting with children.
- 5. Be specific about any financial arrangements.**
- 6. Discuss the topic of liability for any injuries or other damages to mentors or mentees.** Determine how liability will be divided between the partners and the procedures that will be used for reporting and tracking any incidents. Agree on what insurance coverages and limits each partner should have.
- 7. Agree on the “measures of success” for the partnership.** How will you and your partner identify whether you have met the goals you have set? What indicators will you use to measure success? How will you collect the information (for example, anecdotal evidence, surveys, other reporting mechanisms)? Who will be responsible for collecting the information?
- 8. Be certain that you are able to carry out your end of the bargain.**

- 9. Be certain that your partner is able to carry out its end of the bargain.**
- 10. Make a commitment to have open, ongoing communication, and establish a procedure for ensuring that this communication takes place.**
Decide how often you should meet (or talk on the phone) to check in with each other, discuss progress, resolve problems, and identify new opportunities.
- 11. Assign one person in your organization to be the liaison with the partner organization, and make sure the partner organization has similarly designated a liaison.** This will help ensure that the lines of communication remain open.
- 12. Have a written agreement that clearly defines the responsibilities and expectations of each partner.** Oral agreements can be misunderstood when they are made, and they are easily re-interpreted later by one partner or the other.

Maintaining the Partnership

- 1. Communicate regularly.**
- 2. Fulfill any promises you make to the partner organization.**
- 3. Be very specific about any requests you make.**
- 4. Be persistent, but not annoying, in following-up on unfulfilled commitments made by your partner.**
- 5. Be flexible.** Do not expect everything to go exactly as you planned. Be willing to adapt to change.
- 6. Address and resolve problems as soon as they arise.** As you work together to resolve problems, recognize and respect the validity of your partner's experiences and points of view.
- 7. Whenever practical, encourage staff or members of the partner organization to serve on your board or committees.** Similarly, encourage staff or volunteers in your organization to contribute services to your partner organization.
- 8. Give the partner organization public recognition for its contributions.**
- 9. Remember that partnerships between organizations often depend on particular individuals within each organization.** If the key person in your partner organization changes jobs or changes point of view, you may need to rebuild the partnership.

It is important to meet with the new person (for example, new school principal or corporate community relations manager) and talk about what the partnership has accomplished and what benefits the partner organization (for example, the school or business) has derived from it.

- 10. Over time, reassess the costs and benefits of the partnership both to you and the partner.** Organizations and partnerships change—a partnership that is valuable today can, in the future, become more valuable, less valuable, or even work against your interests.

Some Special Considerations for Maintaining Partnerships with Schools

While the good practices described above apply to nurturing a partnership with any type of organization, some special considerations apply to maintaining partnerships with schools, particularly when the mentoring is taking place in the school setting.

- 1. Be sensitive to the larger school environment.** Even after it has entered into a partnership, a school's receptivity to your program may be influenced by aspects of the larger school environment, particularly its level of "openness." There are several indicators of "openness": the level of parent engagement; the strength and involvement of the PTA; the school's willingness to have outside entities such as researchers, the press, and community members visit and spend time within the building; and the extent to which the school is a community resource after hours. Schools that are "open" in these ways are likely to be more flexible and collaborative when dealing with the issues that inevitably arise during partnerships.
- 2. Be aware of the existence of other outside programs in the school.** Be sure your mentoring program complements rather than duplicates existing programming. Being aware of and, where possible, collaborating with existing school-based programs makes it easier to integrate your program into the school and is likely to enhance your value.
- 3. Understand that school staff and administrators may have had negative experiences with previous outside programs.** At times, well-meaning groups and individuals approach schools with the intention of working with them, and then fail to follow through with, or fall short of, their original commitment. That, in turn, is likely to influence a school's attitude toward your mentoring program, and you may meet with resistance from some staff and administrators until your program has proven its reliability and value.

Good Practices for Building and Maintaining Partnerships
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4. Be sure your mentors are aware of, and sensitive to, the school culture.

Mentors should understand the procedures for using school property, honor the dress code, and understand whether, when, and how to access teachers. They should also know if there are any “unwritten rules” governing the space where they are meeting with the child or youth. If, for example, they are meeting in an empty classroom, what are the teacher’s “rules” about using any equipment or materials in the room?



Memorandum of Understanding

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We are looking forward to a partnership with your organization. This agreement between [name of your organization] and [name of partner organization] specifies the expectations of the partnership. The partnership is in effect from [date] to [date].

Partnership Goals

[Name of your organization] and [name of partner organization] agree to work together to:

-
-

Roles and Responsibilities

[Name of your organization] agrees to:

-
-
-
-

[Name of partner organization] agrees to:

-
-
-
-

Finances and Liability

[Name of your organization] agrees to:

-
-
-
-

Memorandum of Understanding
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[Name of partner organization] agrees to:

-
-
-
-

Evaluation

We agree to use these criteria to identify whether the partnership is achieving its goals:

-
-

[Name of your organization] will:

-
-

[Name of partner organization] will:

-
-

Communication

We commit to open and regular communications:

[Fill in details]

- [Who—name or job title—in each organization will be primarily responsible for the ongoing communication?]
- [How, and how often, will the communication take place?]

Your organization (signature and date)

Partner organization (signature and date)



Resources for Forming and Maintaining Partnerships

Print material

Assessing the Benefits of Corporate Volunteer Programs: A Research Study. 1999. Washington, D.C.: Points of Light Foundation. Available from the Points of Light Institute, (800) 272-8306.

Corporate Volunteer Programs—A Strategic Resource: The Link Grows Stronger. 1999. Washington, D.C.: Points of Light Foundation. Available from the Points of Light Institute, (800) 272-8306.

Mentoring: A Synthesis of P/PV's Research: 1988-1995. 1996. Cynthia L. Sipe. Philadelphia: Public/Private Ventures. Available from Public/Private Ventures, (215) 557-4400.

School-Based Mentoring: A First Look Into Its Potential. 1999. Carla Herrera. Philadelphia: Public/Private Ventures. Available from Public/Private Ventures, (215) 557-4400.

Some useful Web sites

www.mentoring.org

The National Mentoring Partnership—includes an online guide to help corporations become involved in mentoring programs.

www.partnersineducation.org

National Association of Partners in Education—includes resources, articles, and links focusing on effective partnerships. The organization can also be reached at 901 North Pitt Street, Suite 320, Alexandria, VA 22314, or by calling (703) 836-4880.

www.pfie.ed.gov

The Partnership on Family Involvement in Education—includes a database for identifying organizations that are members of the partnership in locations around the country.