FAQs FOR CHARITY MENTORS

This document is an attempt to anticipate some of the questions you might have as a mentor. ***There are four key FAQs that we would like you to read before embarking on any projects***: The rest are for browsing and for future reference. If there is something we have missed, please contact Roz, the coordinator for Charity Mentors. (roz@charitymentors.co.uk). Just click on the question to be taken to our response.

Four Key Questions That We Ask All Our Mentors To Have A Look At:

1. What are the guidelines for conducting the meetings?
2. What is the process for bringing a project to an end?
3. What about confidentiality?
4. Is there any formal evaluation process between Charity Mentors and its individual mentors?

OUR COMPREHENSIVE LIST OF FAQs:

I Project Related Questions

1. How does Charity Mentors get its projects?
2. What is the process for taking on a project and finding a suitable mentor?
3. What if I don't like the sound of the project?
4. Where should I meet my mentee?
5. How long should a meeting last?
6. What happens if I decide after the first meeting that as personalities we are not a good match, or that the project is poorly defined, or the mentees' expectations are unrealistic, or I don't want to continue with the project?
7. What if I am a trustee of the organisation or have a personal connection with people connected to the organisation?
8. Are there any guidelines for conducting the meetings?
9. Do you work with any particular mentoring or business tools/models?
10. How often should I meet with my mentee?
11. What if my mentee fails to turn up to a meeting?
12. What if I haven't heard from my mentee for a while?
13. What happens if I feel I am losing momentum or the original objective is not going to be met?
14. What if I am asked to attend a meeting or meet another member of staff or trustees?
15. What if my project looks like lasting longer than 4 to 5 months? For example, more like 6 to 7 months.

16. What if I believe the main issue is due to poor trustee engagement rather than anything the mentee has responsibility for?
17. What if I suspect that there is a safe-guarding issue or illegal/fraudulent activity?
18. Do you ever take on shorter projects? For instance, a one-off meeting?
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21. What if, at the end of a project, a mentee says that they might want to work with a Charity Mentor again in the next few months?

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1. What about confidentiality?
2. What happens if my mentee accuses me of giving harmful advice or some other misdemeanour?
3. What happens if I am asked to provide a reference for the organisation/individual for fund-raising purposes or in order to help the individual find another role outside of the organisation?
4. What if I am a trustee of the organisation or have a personal connection with people connected to the organisation?
5. What happens if I am asked to become a trustee of an organisation that I am mentoring or have mentored?
6. What happens if the organisation offers to pay expenses or a fee?
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8. Is there a fixed-term for mentors?
9. What if I am unable to attend the minimum of two mentor meetings in a year?
10. How does Charity Mentors monitor and measure its own effectiveness?

Working with the other mentors, skills development and helpful organisations/references

1. Contact details for other mentors?
2. Can I contact other mentors if I have questions?
3. How does the “buddy” system work?
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6. What if I know of someone who might make a good mentor?
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Charity Mentors/Mentors/FAQs/FAQs for Charity mentors latest date
7/12/20

I PROJECT RELATED QUESTIONS:

1. How does Charity Mentors get its projects?

There are a number of ways that mentees find us. Via OCVA, OCF, ROBIN or the Lord Lieutenants Office (See Working with the other mentors, skills development and helpful organisations/references). Also through our own networking and marketing efforts or where our mentors have come across an organisation that might benefit from a mentor and, increasingly, through word of mouth from other organisations that we have mentored. The first point of contact is with the coordinator, via email: roz@charitymentors.co.uk.
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2. What is the process for taking on a project and finding a suitable mentor?

The coordinator talks through the project with the potential mentee over the telephone and summarises the conversation by completing a referral form [attached] which contains the mentee contact details, background to the organisation, the issue and what the end of the project might look like (objective). Before the process of finding a mentor starts, the mentee is asked to confirm that the trustees know that a Charity Mentor will be working with them.

Once this has been done, the coordinator selects a mentor on the basis of who is available and who might be best suited to work with the individual (based on intuition!) and the particular issue. The mentee is consulted and, if they are in agreement, the coordinator contacts the potential mentor to ask them about the project. (Quite often, the coordinator will sound-out the potential mentor at the very beginning of this process so that it is possible to move things along more rapidly once the trustees are aware about the project). The coordinator emphasizes the the first meeting is an exploratory one and that there is no commitment on either side. The first meeting is therefore an assessment meeting at which the mentor and mentee can discuss suitability as well as goals.

It is very much appreciated if mentors can respond rapidly to emails (ideally a turnaround time of 48 hours in working hours) so that the process can run as smoothly and quickly as possible. Once a mentor has been found, the coordinator makes an email introduction to the mentee (cc'ing the mentor). It is then up to the mentee to make contact with the mentor and to arrange the first meeting.
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3. What if I don't like the sound of the project?

You are always at liberty to turn-down a project for whatever reason. If you can tell the coordinator the reason why it might help with the matching process for future projects.
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4. Where should I meet my mentee?

Most mentors meet their mentees "off-site". A coffee bar (depending on parking and the potential for reasonably private conversations) or their own place of work. Meetings can also take place at the mentee's place of work but, if possible, out of the office, so that the mentee is not constantly interrupted. However, it is often useful for a mentee to "walk-away" from day-to-day preoccupations by leaving the work environment. Occasionally meetings have taken place at a mentor's house. If you need somewhere private and don't know where to go,

contact the coordinator (roz@charitymentors.co.uk). In Covid-19 times, all meetings took place either by phone or via a video app. It is preferable if at least the first and last meetings can take place in person, but virtual meetings are fine if both sides are comfortable with this arrangement.
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5. How long should a meeting last?

This is up to you and your mentee to agree in advance. The first meeting might be longer – perhaps 2 hours. Other meetings will probably between one and two hours (at the most).
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6. What happens if I decide after any meeting that as personalities we are not a good match, or that the project is poorly defined, or the mentees' expectations are unrealistic, or I don't want to continue with the project?

The mentee will also have been told that the first meeting is a scoping meeting and that there is no obligation to continue. If the project is poorly defined, or if the mentee has unrealistic expectations, it might be possible to rectify this situation at the first meeting. (In many cases, a mentee comes to Charity Mentors and presents their issue as "lack of funds". Digging behind this can be difficult, especially if there is a lack of clarity on the mentees behalf. As far as possible, the coordinator will signal if it has been difficult to tie the objectives down). Where objectives are changed in this way, it would be appreciated if you could let the coordinator know (roz@charitymentors.co.uk).

If the mentor feels that it would not be productive to continue with the project the most transparent approach is to tell the mentee at the meeting. However, if this is not possible/preferable then contact the coordinator after the meeting.

If it is a matter of personality or skills, the mentee may contact the coordinator and request a different mentor. If this is the case, the coordinator will always contact the original mentor and discuss the situation.

If the "fit" is right, the objectives have been pinned down as far as possible and the mentee seems open to mentoring and to have realistic expectations then both sides should let the coordinator know by email that the project is going ahead.
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7. What if I am a trustee of the organisation or have a personal connection with people connected to the organisation?

Let the coordinator know as soon as possible (roz@charitymentors.co.uk). In most cases it will be better to find an alternative mentor.
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8. Are there any guidelines for conducting the meetings?

First meeting: It is important to ensure that the mentee is open to mentoring, has realistic expectations and holds a position within the organisation that enables them to make strategic decisions (ie you are mentoring a person who holds the right position). This first meeting is an "assessment" meeting, to see if there is a contract to be agreed by both, with no strings attached. The purpose of this meeting is to establish whether CM is the right service for the person and organisation. It is important to build rapport and trust and to engage the mentee and therefore not to be too task-oriented at the beginning of the meeting. (Some of our mentees feel nervous about their first meeting). However, by the end of the meeting, there does need to be clarity about whether there is a 'contract': what the objectives of the mentoring project are.; what will the end of the project look like? Many of our mentors ask their mentees to reflect, to make notes and feedback on what was covered in the meeting and what the "homework" is. We also recommend that you make a date for the second meeting that closely follows the first (within a fortnight if possible), in order to establish pace. It might not be possible to agree a schedule of dates in advance, but if you can identify milestones, it is a useful way of giving clarity and establish focus. Email the coordinator after this first meeting to let her know if you are continuing with the project (see FAQ : "What happens if I decide after the first meeting that as personalities we are not a good match….") and also the date of the next meeting.

Subsequent meetings: Once the project is underway, it is not necessary to let the coordinator know about dates of future meetings.

Final meeting: There are two particular items that we ask you to cover in the final meeting:
1) Could you please ***start a line of questioning that promotes reflection by the mentee***. Something along the lines of: *How useful was the project? What was useful? What might have been more useful? (HuWuMu!)* We ask that you report back these mentee reflections in your own feedback. The idea is to start the process of reflection at the last meeting in order speed the return of the written feedback forms and elicit ideas and responses that might not otherwise be included on the written form.
2) Could you also tell the mentee that ***you will be back in touch within 6 months to see how things are going***? You and your mentee should agree together on 2 or 3 goals that the mentee will work on over the next 6 months. Please write down these goals – there is a template so please make sure you have it. (We call it the electronic "postcard" because we used to have a physical postcard which the mentee completed by hand and then got posted back to them. But the logistics of posting and following up became rather difficult, so we have resorted to an electronic postcard!). Please email these goals back to me and I will make a diary note and ask you to follow up, either by phone or person (your choice) in 6 months' time.

When the final meeting is completed you should email the coordinator and ask for a feedback form for yourself and for your mentee.
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9. Do you work with any particular mentoring or business tools/models?

Some of our mentors work with models that they have used previously and found helpful but we do not have any recommended models or approaches.
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10. How often should I meet with my mentee?

This is for you and your mentee to decide. We recommend that you always set a date for the next meeting at the end of each session. It might not be possible to agree a schedule of dates

in advance, but if you can identify milestones, it is a useful way to give clarity and establish focus. We also recommend that you make a date for the second meeting which closely follows the first (within a fortnight if possible), in order to establish pace.
Click to go back to list of questions.

11. What if my mentee fails to turn up to a meeting?

The referral form should contain a mobile number and an office number for your mentee. If it only happens once, and they respond appropriately, then it is annoying but these things do happen. If they go AWOL or it happens again, contact the coordinator (roz@charitymentors.co.uk) immediately.
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12. What if I haven't heard from my mentee for a while?

It depends a bit on what you have agreed in terms of contact. If you don't have a date for your next meeting (*we recommend that you always make a date for the subsequent meeting at the end of each mentoring session*), you should contact them. Whilst we understand that there are many pressures on charity leaders, we want our mentees to understand that they are getting an enormous benefit through your generosity and that they will lose it if they don't use it appropriately. If that doesn't work, contact the coordinator (roz@charitymentors.co.uk). If this is more than a one-off, we need to get much tougher because it implies that our service is not being properly valued.
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13. What happens if I feel I am losing momentum or the original objective is not going to be met?

It is obviously much better to talk about this than to let things drift. This might be with the mentor him or herself. If it is close to a mentor meeting, you might want to bring this issue to a meeting in order to decide the best way forward. Or contact your buddy or the coordinator.
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14. What if I am asked to attend a meeting or meet another member of staff or trustees?

On the whole, we think it best if mentors do not meet with trustees or other employees. It can compromise the mentoring relationship in unforeseen ways. We have had instances where trustees try to influence the outcome of a mentoring project in some way, or want to use the project to push a particular agenda. Our view is that if a trustee wants to see a particular outcome, they should communicate directly with the mentee themselves. Our mentors should not be used as a go-between. However, there is some discretion here but proceed with caution!!
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15. What if my project looks like lasting longer than 4 months? For example, more like 6 to 7 months.

This does happen but it should be the exception rather than the rule. If the project looks like it is going to go beyond 4 to 5 months, you should discuss with your buddy or the coordinator and, in any case, get in touch with the coordinator to let them know (roz@charitymentors.co.uk).

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16. What if I believe the main issue is due to poor trustee engagement rather than anything the mentee has responsibility for?

Lack of trustee engagement/support is a problem that is often identified by our mentors and should of course be talked through with the mentee, just like any other challenge. This is an issue that is sometimes brought to the mentors' meetings for discussion by the group of mentors as a whole – each case is different – or something that your buddy might helpfully talk through with you.

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17. What if I suspect that there is a safe-guarding issue or illegal/fraudulent activity?

Our contract with the mentee relies on confidentiality, *apart from when we suspect that there are issues over safe-guarding or illegal/fraudulent activity*. At the bottom of the referral form, under "Confidentiality", we undertake not to pass details of matters discussed to anyone else outside of Charity Mentors without permission *unless* a mentor discovers something potentially illegal or the mentor believes there is a risk of significant harm to an individual(s). If you have any concerns that this might be the case, you should raise them with the coordinator as soon as possible (roz@charitymentors.co.uk).

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18. Do you ever take on shorter projects? For instance, a one-off meeting?

Occasionally we do take on projects that will probably last for only one meeting. For instance, a start-up (quite often we turn down start-ups for mentoring and prefer an organisation that has been standing on its own two feet for a year or so at least) or where the issue seems to lend itself to just one session. There might also be cases where the coordinator would like the mentors help in teasing out the issues and what the objectives should be.

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19. What is the process for bringing a project to an end?

When the final meeting is completed you should email the coordinator and ask for a feedback form for yourself and for your mentee. There are guidelines on how to conduct the final mentoring meeting (see "Are there any guidelines for conducting the meetings?"). If during the life of the project, circumstances have intervened and you feel that you have lost sight of what the end objectives should be, you should speak to the coordinator (roz@charitymentors.co.uk) or to your buddy to get assistance.

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20. Do you follow-up on projects?

Yes. We ask that both the mentor and mentee provide us with feedback at the end of a project (See FAQ: What is the process for bringing a project to an end?). We also ask each mentor to complete our electronic postcard with their mentee on which they record the 2 or 3 things that the mentee wants to achieve as a result of the mentoring in the following months.

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21. What if, at the end of a project, a mentee says that they might want to work with a Charity Mentor again in the next few months?

They should signal this in their feedback. Charity Mentors is happy to supply another charity mentor in the appropriate circumstances although it is unlikely to be the same person as the mentee had for the first assignment.
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II GOVERNANCE AND EVALUATION

1. What about confidentiality?

We take confidentiality extremely seriously. Our service relies on a trusting relationship between the mentor and mentee.

- The fact that a mentoring project has taken place between Charity Mentors and an organisation is not confidential and we make this clear on the initial referral form. We can say that we have worked with "Fred(a) Bloggs of xyz organisation".
- We ask the mentee to tell their trustees that they will be working with a Charity Mentor. We also ask the mentees to summarise the outcomes at the end of the project so that they can report back to their trustees. However, they should not be under any obligation to give details of the mentoring meetings and neither should the trustees be able to influence the content of the meetings. If trustees wish to influence the content/objectives of the mentoring project, they will be asked to communicate directly with the mentee.
- Our internal mentor meetings allow for the discussion of specific cases. During these discussions, confidential information will be shared and this must be kept within the confines of the mentor group. If a mentor is a friend of a mentee that is being discussed, they must reveal this and absent themselves from the discussion. Mentors who are sharing information for the purposes of the case discussion should use their discretion as to how much detail it is necessary to reveal to the group.
- On no account should the details of a mentoring project be revealed or discussed outside of the Charity Mentors group. (Apart from where there are concerns about safeguarding or concerns about illegal or fraudulent activity. When these concerns arise, the mentor should contact the coordinator as soon as possible to discuss the appropriate course of action roz@charitymentors.co.uk).
- The mentee feedback form does ask for specific permission to quote the mentee. If this is given, these quotes might be used for marketing purposes.

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2. What happens if my mentee accuses me of giving harmful advice or some other misdemeanour?

We ask our mentors never to give direct advice. We also make it clear on our initial referral form under "Responsibility for decisions" that "Neither an individual mentor nor Charity Mentors can take any responsibility for decisions made, whether on the basis of advice given or not. Responsibility for decisions made remains at all time with the trustees of the organisation." And, we contact the chair of each organization and ask for email confirmation that they understand this before proceeding with the project.
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3. What happens if I am asked to provide a reference for the organisation/individual for fund-raising purposes or in order to help the individual find another role outside of the organisation?

Our policy is that mentors will not give a reference following a mentoring project. This avoids the impression that the mentoring is connected to funding in any way. If, *after at least three months has elapsed since completion of a project* (calculated from the time that the mentee returns the completed feedback), a mentor would like to give a reference in a *personal capacity*, then we suggest a further visit or telephone call is made and the mentor and mentee are clear that the reference is not given on behalf of Charity Mentors but in a purely personal capacity. We suggest the following wording for a reference in these circumstances: *"I encountered this organisation during a mentoring relationship with x, as part of a Charity Mentors Oxfordshire project. The mentoring took place between [date] and [date], the project being completed and closed on [date]. As a result of being asked to supply this reference, I made further contact with the organisation on [date]. This reference is given in a purely personal capacity and, although based partly on knowledge gained during the Charity Mentors' project, is not given on behalf of Charity Mentors nor does it in any way necessarily reflect the view of that organisation."….*

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4. What if I am a trustee of the organisation, or have a personal connection with people connected to the organisation?

Let the coordinator know as soon as possible (roz@charitymentors.co.uk). In most cases it will be better to find an alternative mentor.

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5. What happens if I am asked to become a trustee of an organisation that I am mentoring or have mentored?

This has happened with some of our mentors already. It is helpful if you let the coordinator know if you are going to become a trustee. Our only plea would be that we need you for Charity Mentors' projects! We would also offer a word of caution. The contract between a CEO and trustee is very different to that between a CEO and mentor. As a mentor, you will have learnt things and heard confidences that might make this change in contract very difficult to handle…

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6. What happens if the organisation offers to pay expenses or a fee?

Our contract is to offer free-of-charge mentoring. It is not appropriate to accept a fee or expenses. If you know that there are exceptional circumstances and that you would need to claim expenses, please do speak to the coordinator about this situation in advance (roz@charitymentors.co.uk). Donations are of course welcome!

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7. Is there any formal evaluation process between Charity Mentors and its individual mentors?

Your gift of time and expertise in supporting Charity Mentors is very much appreciated. We could not exist without it and we know that the success of Charity Mentors is because of your help. It is important to us that we do everything that we can to support you whilst making sure that our communications and requests for help do not become too burdensome. We hope that we get the balance right but if ever there is a problem with this, or any other issue, you should feel free to raise it with either the coordinator (roz@charitymentors.co.uk) or with the chair (marion@charitymentors.co.uk). Alternatively, your buddy or any other mentor might be a useful port of call if the issue regards a mentoring case rather than coordination of Charity Mentors. In any case, we welcome constructive feedback at any time or any ideas that might help us to improve our service.

In addition to the more informal channels of communication, we also try to make time for a more structured conversation with the coordinator of Charity Mentors every 18-months to two-years. These reviews are an opportunity to discuss client feedback and for you to make known preferences, issues or ideas. They are an opportunity for reflection in terms of what works and what doesn't work and to reflect on client feed-back.

From the point of view of Charity Mentors, we would ask if mentors could bear in mind the points from the original “Role Description” that they received before becoming a mentor. These include:

- Undertake an average of two mentoring projects per year.
- Attend at least two of the four annual mentoring meetings, and, where possible active participation in group case discussions.
- Attend a bi-ennial review in order to discuss the mentoring process, performance standards, case histories and future availability.
- A willingness to take on a range of problems and clients.
- Communicate with the coordinator as needed during mentoring projects (and to respond promptly to requests for information or enquiries about availability for a particular mentoring project, as far as possible with a maximum 48 hour (working hours) turn-around for email replies).
- Complete and return feedback forms at the end of each mentoring project and follow feedback guidelines for final mentor meeting concerning reflection and 6-month follow-up.
- If for any reason a mentor can no longer fulfill the requirements of the role (including attending at least two meetings, the annual review and mentoring projects), he or she should contact the coordinator and either agree to a suspension or a termination.
- Any agreement that extends the relationship between the mentor and the organisation beyond that covered by the pro-bono mentoring services, must not proceed until after the termination of the Charity Mentors’ project, and the coordinator of Charity Mentors should be informed of the terms of the relationship.

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8. Is there a fixed-term for mentors?

The term, as specified in our Role Description, is for 5 years, renewable by mutual agreement. We hope that you will be able to stay with us for the full term although, of course, you have the right to terminate your role at any time. It would, however, be appreciated if you could give as much notice as possible and fulfil your mentee obligations before terminating.

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9. What if I am unable to attend the minimum of two mentor meetings in a year?

We are very keen for mentors to attend as many meetings as possible. Our mentors are key to our success and we hope that the mentor meetings give an opportunity for discussions about case issues as well as mentoring approaches that will enable us to improve and refine the quality of our service. In addition, we hope that you will enjoy meeting your fellow mentors. If the meetings are not providing this for you, please do say. If you are unable to attend due to other commitments, we need to talk about the circumstances. Is it a temporary blip or an ongoing situation? It may be that if dates are difficult we would ask you to have an individual session with another mentor.

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10. How does Charity Mentors monitor and measure its own effectiveness?

Our main source of information is from the feedback forms that we ask both mentors and mentees to complete at the end of a project. The format of the form was changed at the beginning of 2015, so the details have changed over time. We have also conducted 3 Impact Assessments (the latest is available on our website).

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Working with the other mentors, skills development and helpful organisations/references

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1. Can I contact other mentors if I have questions?

There shouldn't be a problem with contacting any of the other mentors, the chair or coordinator. Please feel free. We have the "buddy" system but contact whoever you think could assist you best.

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2. How does the "buddy" system work?

We introduced the buddy system at the beginning of 2016. Everyone has been assigned a "buddy" who they can use to chew over ideas, issues or discuss cases on a more regular basis than the quarterly mentors' meetings. Some people rarely use their buddies, others make more frequent use. It is completely up to you. And if you wish to change your buddy, providing the new buddy is willing, there should be no problem in making the change.

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Is there any formal evaluation process between Charity Mentors and its individual mentors?

Your gift of time and expertise in supporting Charity Mentors is very much appreciated. We could not exist without it and we know that the success of Charity Mentors is because of your help. It is really important to us that we do everything that we can to support you whilst making sure that our communications and requests for help do not become too burdensome. We hope that we get the balance right but if ever there is a problem with this, or any other issue, you should feel free to raise it with the coordinator (roz@charitymentors.co.uk). Alternatively, your buddy or any other mentor might be a useful port of call if the issue regards a mentoring case rather than coordination of Charity Mentors. In any case, we welcome constructive feedback at any time or any ideas that might help us to improve our service.

In addition to the more informal channels of communication, we also try to make time for a more structured conversation with the coordinator of Charity Mentors after your first year of mentoring and after years 3 and 5. These reviews are an opportunity to discuss client feedback and for you to make known preferences, issues or ideas. They are an opportunity for reflection in terms of what works and what doesn't work and to reflect on client feed-back.

From the point of view of Charity Mentors, we would ask if mentors could bear in mind the points from the original "Role Description" that they received before becoming a mentor. These include:

- Undertake an average of two mentoring projects per year.
- Attend at least two of the four annual mentoring meetings, and, where possible active participation in group case discussions.
- Meet with mentoring "buddy" for one-on-one sharing and reflection. For the first 2 mentoring projects, we ask that a buddy meeting takes place at the beginning and end of each project and would then encourage buddy meetings to continue on an annual basis.
- Attend reviews with the coordinator in order to discuss the mentoring process, performance standards, case histories and future availability. The structure of the review is detailed below. Reviews would be arranged for years 1, 3 and 5 of the mentor engagement.
- A willingness to take on a range of problems and clients.
- Maintain strict confidentiality, sharing information with Charity Mentors with the agreement of the mentee. Confidentiality must also be maintained when a mentoring project is used as a learning case study at a mentors' meeting.
- Communicate with the coordinator as needed during mentoring projects (and to respond promptly to requests for information or enquiries about availability for a particular mentoring project, as far as possible within 2 working days for email replies).
- Complete and return feedback forms at the end of each mentoring project and follow feedback guidelines for final meeting with mentee concerning reflection and 6-month follow-up.
- If for any reason a mentor can no longer fulfill the requirements of the role (including attending at least two meetings, the reviews with coordinator and mentoring projects), he or she should contact the coordinator and either agree to a suspension or a termination.
- Any agreement that extends the relationship between the mentor and the organisation beyond that covered by the pro-bono mentoring services, must not proceed until after the termination of the Charity Mentors' project, and the coordinator of Charity Mentors should be informed of the terms of the relationship.
- Please read our policies on taking trusteeships with client organizations, giving references to client organizations, confidentiality, expenses, complaints and equality and diversity. We also have a signed code of conduct which we ask all mentors to read and acknowledge.
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3. What happens if I am likely to be away for a prolonged period of time?

If you are going to be away during a mentoring project, for the most part, you can work around it by arranging meetings accordingly. However, if you are going to be away for longer, say for three-weeks or more, could you please let the coordinator know, especially if you are between projects and/or difficult to reach.

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4. What if I know of someone who might make a good mentor?

Please do let the coordinator know (roz@charitymentors.co.uk)! Even if we are not looking to add to our mentoring list at the current time, it is always very useful to have potential mentors that we can contact when we need to expand or fill a gap.
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5. Other useful organisations that I should be aware of?

If you have any additions, please send them to the coordinator (roz@charitymentors.co.uk).

Oxfordshire organisations:

OCVA (Oxfordshire Community & Voluntary Action). https://ocva.org.uk/: Umbrella body for the Oxfordshire voluntary and community sector. They provide regular training workshops, a newsletter, help with volunteer coordination and some bespoke advice on funding and charity matters. They have a useful page on funding sources https://ocva.org.uk/core/groupdevelopment/funding/. Charity Mentors tries to maintain close ties with OCVA and to work in collaboration with them where possible. The national body (NCVO) hosts a couple of useful websites – see "Know How Non-Profit" under websites below.

OCF (Oxfordshire Community Foundation). http://oxfordshire.org/ : The mission of OCF is to inspire local philanthropy and develop community based solutions to key social problems. Philanthropists can either give the management of their funds entirely over to OCF or stipulate how they would like their funds to be directed. The Chair of OCF, John Taylor, is a trustee of Charity Mentors. They have 3 areas of strategic focus: housing and homelessness, loneliness and isolation, and children and families. For info on activities in these 3 areas, see OCF's 2018 Impact Repot https://oxfordshire.org/impact/reports/ . There is also a regular distribution of funds via 3 different programmes which target different sized groups and ambitions: "small and vital" offering up to £1.5k for groups with revenue of up to £100k; "delivering impact" offering between £1.5k and £10k; and "step change" offering up to £75k for groups with revenues between £75k and £750k. https://oxfordshire.org/grants/

Lieutenancy List. A website but invaluable local resource which holds a confidential list of individuals who have put themselves forward to stand as trustees for charities. The charities should contact office@stevenson-oxford.co.uk to get more information.

Robin (Responsible Oxfordshire Business Involvement Network). http://www.robinoxford.org.uk/ : A network group that has quarterly meetings encouraging local businesses, public sector bodies and charities to meet and share skills and resources. There is also a Linked-in page for inter-meeting communications. Charity Mentors is a regular attendee at these meetings but mentors would be most welcome to attend. Membership is free.

Jennings Business Mentors (formerly Oxford Business Mentors). http://www.jenningsbusinessmentors.org/about-us : A free peer-to-peer mentoring service for business owners that also mentors charities. Some of our mentees have also used this mentoring service.

Monitor Community Trust https://www.mct-oxfordshire.org/ . Set up by Jennings (see above), Monitor provides mentoring and sometimes funding and other support to charities in Oxfordshire.

Nexus https://nexus.b4-business.com/ (formerly Reciprocate http://reciprocateox.org/): A membership network for Oxfordshire companies to channel CSR initiatives in a meaningful way (Reciprocate is currently hosted by OCF). They can provide training and skills to some charities and run seminars and network meetings.

Accounting for Community, Engaging Students (ACES), Brookes University accountancy help for charities https://www.brookes.ac.uk/business/undergraduate/careers/accounting-for-community-engaging-students/ Brookes will provide second and final year accountancy student to provide accountancy/bookkeeping help to charities. Various charities do use this service and it can be a very useful resource although, clearly, the quality of the help depends on the quality of the student so supervision is required.

Oxfordshire Business Enterprises http://oxonbe.co.uk/ Free face to face advice for Oxfordshire businesses. Free advice to anyone planning to start a business or within 2-years of starting it.

Useful websites:

The Charity Commission. **https://www.gov.uk/government/organisations/charity-commission:** Your first stop for most issues relating to charities including: searching for a particular charity (gives financial details, trustees etc); how to set up and register a charity (and the differences between the different types of structure); guidance for trustees and charity advisers; regulatory alerts, inquiry and case reports; how to close a charity. Full list of publications: https://www.gov.uk/government/organisations/charity-commission/about/publication-scheme

Association of Chairs. **https://www.associationofchairs.org.uk/ :** Support Chairs of charities and non-profits. Membership is between £50-100 pa. They run training and networking events (eg sessions for new chairs) and provide free resources on their website, for instance "A question of balance: A guide to the chair and ceo relationship" https://www.associationofchairs.org.uk/resources/download-qob/ (the Charity Commission also has excellent guidance on trustee and chair duties and responsibilities). The Beacon programme is specifically for supporting chairs of smaller charities https://www.associationofchairs.org.uk/beacon/

NCVO's knowledge and skills hub. https://knowhownonprofit.org/ Various resources on charity matters plus online training courses eg how to write a marketing plan (have no idea of their quality) or advice on working collaboratively advice:

https://knowhownonprofit.org/organisation/collaboration/working-collaboratively/working-together-to-achieve-your-mission-ncvo#

ACEVO (Associaton for Chief Executives of Voluntary Organisations).
https://www.acevo.org.uk/ Charity leaders network. Offer support, advice and leadership training to charity CEOs. Membership costs £685 for 3-year membership for a CEO of an org with revenue between £150-500k. Their "crisis support" is worth knowing about https://www.acevo.org.uk/advice-support/ceo-crisis), although you need to have been a member for 3 months before this benefit can be accessed.

FSI (Foundation for Social Improvement) https://www.thefsi.org/ Provide training and resources for charities. Membership is free if turnover less than £1mn. For instance, they offer a 5-7 hour, e-learning "fundraising strategy" course, for a small fee.

Small Charities Coalition https://www.smallcharities.org.uk/home/ Set up to support small charities. Run training courses, peer-to-peer mentoring and other services (eg https://www.smallcharities.org.uk/resources/) and have just launched a useful website that guides through the process of registering a charity or CIO with the Charity Commission https://charitysetup.org.uk/

Charity Catalogue https://charitycatalogue.com/ Lists useful online tools that help charities increase impact and productivity (CRM systems, design tools, website programmes, photo stocks etc).

Charity Excellence Framework https://www.charityexcellence.co.uk/Home/FAQs Came into its own during the Coronavirus outbreak because it provided lots of information about funders. Its core service is a free to use framework that takes you through your strategy, governance, model.

Impetus Private Equity Foundation http://www.impetus-pef.org.uk/who-we-are/our-mission/ Provides management support, pro-bono guidance and funds to charities who they have identified as having a promising track record in helping young people aged 11-24. They have been involved with several Oxfordshire charities, for instance OXPIP [who no longer qualify because they are outside of the recently adopted age range] and Family Links.

Pilotlight http://www.pilotlight.org.uk/ Pilotlight charge companies a membership fee and then match them with charities to offer mentoring and share skills (there is also a membership scheme for individuals of £1,500 pa). Pilotlight has worked with Reading Quest in Oxfordshire when they approached Pilotlight for help in extending outside of Oxfordshire.

Lloyds Bank Foundation https://www.lloydsbankfoundation.org.uk/ Provide funding and mentoring to small but vital charities in the UK, so worth knowing about. Will fund over a number of years and will consider some core costs.

Trust funding and other funding websites
www.trustfunding.org.uk . Gives criteria that trust funds and foundations require. A subscription based site but there is a very good free demo.

www.companygiving.org.uk (details of companies' giving methods and what they are likely to fund: 585 companies giving over £850 million)
www.governmentfunding.org.uk (key dates, notification on funding rounds, new funder ratings and improved search function: over £2.3 billion from local, national and European sources.)
www.fundingcentral.org.uk : Free website subscription. This shows grants from trusts AND contracts from local authorities that you don't see from trustfunding.org. If you register with them you also get their newsletter which is a very useful source of funders, prioritising by deadline.
https://www.gov.uk/claim-gift-aid/overview. No matter how small your charity, you can claim 25p on every £1 donated so long as the donor is an individual who pays tax and you are a recognized charitable organisation. Website has explanations and forms.

IT for charities www.itforcharities.co.uk. Gives useful details of database and CRM providers.

Insights and data on Oxfordshire population, income, health and other socio-economic data http://insight.oxfordshire.gov.uk/cms/

JSNA Joint Strategic Needs Assessment http://insight.oxfordshire.gov.uk/cms/joint-strategic-needs-assessment . The JSNA is an annual report that gives information about Oxfordshire's population and the factors affecting health, wellbeing, and social care needs.

Cenus data: https://www.ons.gov.uk/census/2011census

HR advice for charities: See https://www.smallcharities.org.uk/resources-hr/. Also https://www.ncvo.org.uk/practical-support/trusted-suppliers/supplier-list/299-hr-services-partnership . And Cranfield Trust's https://www.cranfieldtrust.org/pages/11-hrnet

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