

# TOOLS FOR OM

## - GRASSROOTS GROUP COLLABORATION

### WHAT IS AN ORGANIZATIONAL MENTOR?

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An organizational mentor (OM) is an incorporated non-profit organization, a charitable organization or First Nation, Métis Inuit or other Indigenous organization that meets Ontario Trillium Foundation (OTF) eligibility criteria, enabling it to receive funds directly from OTF. Review OTF's [eligibility policy](#). OMs provide administrative support, project mentoring, and financial accountability to Youth Opportunities Fund (YOF) grassroots groups.

Terms such as trustees, emerging governance platform, platform, or charitable home may be more familiar to you.

### HOW DO WE FIND THE RIGHT OM FOR OUR GROUP?

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Grassroots groups choose their OM, supported by the YOF if needed. Use these tools as you search for right the OM for your group and initiative.

#### **Build a shortlist of two or three potential OMs**

- Brainstorm a list of organizations whose work aligns with yours.
- Do you have a mentor or adult ally who can recommend potential OMs?
- Is your group already connected with organizations through past programs, volunteering, etc.?
- Are there organizations in your community that you would like to partner with?
- Review [the list of current and past grantees](#) on the OTF website to see organizations that are, or have been, OMs.
- Connect with other grassroots groups to see which organizations they have worked with and lessons learned.

#### **Learn more about the OMs on your shortlist**

- Check if you share similar mission and mandates.
- Do the OMs on your list share your core values?
- Will a partnership be mutually enriching?
- Where possible, informally connect with people who work for the OM to get a deeper understanding of their mandate, their work in community and who they serve and engage.
- Have the OMs on your list worked with other grassroots groups? If yes, try connecting with these groups to learn more about their experience.

#### **Select the OM you would like to work with and start building a relationship**

- Make an appointment to share more details about your work and the initiative your group is embarking on.

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- It is critical to connect with the Executive Director or other senior management staff before you make your final decision: frontline staff do not have the signing authority to agree to this partnership.
- Demonstrate the value that your project brings to the OM and how it aligns with the OM's mission and programming.
- As a starting point, use the conversation guide (below) to help shape your initial discussion.
- Ask if the organization is interested in working with you as well – don't assume!
- Don't be discouraged if the organization is unable to be your OM. It might be that they don't have the capacity to partner at this time or perhaps they are already partnered with another grassroots group applying to the YOF. Ask for recommendations of other organizations you could approach.

### Plan for overhead and administrative support costs

- Total administrative costs cannot exceed more than 15% of the budget.
- While it is hard to talk about money, it's important to discuss these costs with the OM up front.

**IMPORTANT!** Grassroots groups that submit an Expression of Interest should start looking for an OM early and begin building a relationship as soon as possible. Building a positive and productive relationship takes time.

**NOTE!** If the OM's relationship with a grassroots group ends during the life of the grant, the project cannot be transferred to a new OM. In these situations, and depending on the circumstances, the grant may be rescinded.

## WHAT IS AN OM - GRASSROOTS GROUP COLLABORATIVE AGREEMENT?

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Shortlisted groups must submit a signed OM - Grassroots Groups Collaborative Agreement approximately 15 business days after receiving the news that they have been shortlisted. The YOF has an [OM – Grassroots Group Collaborative Agreement](#) template that you must use.

### As you complete the agreement, take this opportunity to:

- Identify who will be the main point of contact for your group as well as for the OM.
- Set realistic goals for the kinds of support the OM can offer.
- Identify the frequency of formal meetings, check-ins, and reporting.
- Identify the financial and project reporting tools that the OM uses.
- Develop a schedule for the release of funds and reconciliation of project expenses.

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- Develop a mechanism for problem solving and giving/receiving feedback.
- Develop a process for managing and reconciling funds.

## CONVERSATION GUIDE FOR GROUPS AND OMS

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### Questions grassroots groups can ask of selected OMs:

- Why are you interested in mentoring and working with grassroots groups?
- What do you need from us to make this partnership positive and productive?
- Can you share what you've learned from past experiences working with other groups?
- What type of support can your organization offer as we implement our project idea?
- Would you be able to provide us with feedback as we deliver our project?
- Would you be open to creating a mechanism to share lessons learned and for problem solving as we enter into this partnership?
- How much should be allocated for overhead and administrative costs incurred by your organization (as a % of our total budget)? (Note that there is a maximum of 15% for overhead and administrative costs for OMs)
- How frequently would you like to have meetings and check-ins?
- What process will you use to administer funds?
- What will the reconciliation process look like?
- Will there be an opportunity to access space, resources and/or tools from your organization?
- Can you provide a specific contact that has the time and resources to support our project?
- Is there a secondary contact in the case of an absence, emergency or change in staffing?

### Questions OMs can ask of grassroots youth groups:

- Tell us about your group. How many members do you have? What are the different roles that your members play?
- Tell us about your project idea.
- What kind of partnership would you like to have if we work together?
- Can you share your past experiences working with an OM?
- What type of support are you looking for as you implement your project idea and plan for the future?
- Are there any specific areas of your project that you would like our expertise in?
- How frequently would you like to have meetings and check-ins?
- What is the frequency of the reporting, meetings, and check-ins that you would anticipate?