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Amelior Foundation

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Raymond G. Chambers

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MEMORANDUM

September 8, 1994

TO:

*William Galston
Deputy Assistant to the President
for Domestic Policy*

FROM:

Ray Chambers

While we have not yet had the pleasure of meeting, I understand that Gaynor McCown has very thoughtfully agreed to enlist your help on behalf of a project that I am greatly interested in. I appreciate the thought and consideration I know you will give this proposal. I'm confident it offers great potential to the Administration, and can do much to advance the interests of America's children and communities at-risk.

My experience in business and in a number of different philanthropic initiatives has convinced me that more can be done to serve children in need through mentoring than any other form of intervention. Mentors who enter the lives of at-risk children can often do more than is feasible or realistic to expect any array of philanthropic or government interests to provide. Moreover, much-needed changes in the underlying attitudes and relationships between America's "haves" and its "have-nots" that I believe must come about, can in many ways be accelerated through the more widespread advancement of mentoring. I presume that these reasons may have played a role in the President's decision to call this past Spring for one million new mentors.

I and others have long-recognized the critical need for "standard-setting" mentoring initiatives that can serve as the basis for replication by public and private mentoring programs alike. One of the key factors that has inhibited the growth of mentoring has been the absence of these clearly-defined standards and benchmarks around which public and private interests can create mentoring programs

Toward this end, we recently entered into discussions with two Department of Justice officials who have managed with great distinction a number of DOJ programs and activities that involve juvenile justice, crime prevention, and community development. These individuals, who know first-hand the value of mentoring in stemming violence and other social ills, have indicated that they can be assigned for two-years to a public/private venture which would work to assure that selected mentoring initiatives serve as benchmarks for replication.

They and two or three more-junior DOJ staff members would be detailed to this venture for two years, remaining on their existing federal payrolls but working full-time solely on this public/private venture. They would then return to Justice.

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Accordingly, the Amelior Foundation, New Era Philanthropy, Heal L.A. and other private funders are prepared to fund a new entity – the National Mentoring Development Coalition – to house these efforts. We anticipate a two-year budget of approximately one million dollars; more if the scope of this project warrants expansion. The federal government's salary obligations for this group will remain as they are at present, at approximately \$300,000 per year.

While it is our understanding that the Department of Justice will look favorably on detailing these individuals to this public/private venture, and that these two-year "detailings" occur regularly throughout various federal agencies, we have been advised that a message to the Attorney General from the appropriate Administration source will expedite this effort considerably. It is my hope that you may be able to assist in this effort. If so, I hope we can move forward expeditiously.

You should know that at the same time that through Gaynor I have been able to solicit your help, a good friend – Bill Milliken, the president of Cities In Schools, Inc. – will soon have an opportunity to familiarize his friend and former colleague Carol Rasco with this proposal. With your support and hers, I'm hopeful that an appropriate message can be communicated to the Department of Justice.

I'll take this opportunity to mention that I believe this venture offers another form of potential that also holds great promise. Specifically, in the course of carrying out this venture I know the individuals involved will use their experience working with senior-level federal program managers to see whether agencies and departments that are not currently advancing mentoring – but which could offer such support – might begin doing so. The result can be strong, credible and informed advocacy for mentoring within the federal government – a key ingredient that has been missing as we have worked to bring mentoring "to scale." Of course, it is my express intent that these efforts be carried out in ways that complement and serve the Administration's efforts in this area.

I would be delighted to ask those with whom we've worked to create this opportunity to provide you with a brief summary of the program components we envision. Likewise, I'm sure they would be happy to talk with you to answer any questions you might have.

As beginning early next week I will be traveling, I will be difficult to reach. Accordingly, I will ask Joe Rutledge to call to see whether we can answer any questions you may have, or provide any assistance.

Again, my thanks for your consideration of this initiative.

MEMORANDUM

September 20, 1994

CORPORATION

FOR NATIONAL

 **SERVICE**

To: Bill Galston

From: Susan Stroud

Re: interagency mentoring working group

I have attached a brief memo that Peter Edelman and I recently sent to Carol Rasco about the efforts to organize an interagency mentoring working group.

The first meeting of the group is scheduled for September 28 from 12:00 - 2:00 at the Corporation. My office has been in touch with Mickey Levitan to invite him to the meeting.

Please let me know about any follow up you have with Ray Chamber's staff about their proposal to establish a mentoring corporation. I told Eli at this point that I don't think he needs to return Joe Rutledge's call because we had worked out a response that you were going to deliver to Ray's staff as follow up to your meeting with them yesterday. If it is necessary for Eli to reinforce the message, please let me know and I will have him call. Thanks.

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Washington, DC 20525
Telephone 202-606-6000
Fax 202-606-4928

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National Senior Service Corps

SUMMARY

NATIONAL CORPORATION FOR MENTORING

- I. A major public/private venture among selected private corporations and the Federal Government for developing and promoting state-of-the-art mentoring services by concentrating significant public and private resources.
 - Standard-setting initiative that will continually stimulate innovation in the approach and delivery of mentoring services.
 - It has an ambitious, yet attainable goal of fielding 5,000,000 mentors across the country in 3 to 5 years.
 - It will benefit a variety of youth populations including those in high-crime neighborhoods and public housing, through education, health, recreation, religious, justice, and social service institutions.
- II. Relationship to Administration's Programmatic and Organizational Priorities
 - Complements numerous existing Administration programs throughout the Federal Government which focus on youth.
 - Represents a small initial investment for the public sector (salaries only) for a high return in private funds.
 - Provides an attractive opportunity for the Federal Government because of the universal appeal of the topic area and the limited initial investment.
 - Provides a potentially high profile vehicle that could be used to coordinate private resources with Federal, as well as State, and local resources.
 - Generates a national effort supported primarily by local public and private resources with a relatively modest private and Federal initial investment for development.
 - Creates a small, streamlined, simple organizational structure to develop the initiative, deploy private and public resources, as well as leverage new and existing private and public resources nationwide.

III. Action

- **Call to the Attorney General to explain that this is a Public/Private Partnership sponsored by the Administration through the Domestic Policy Council.**
- **A major private sector entrepreneur intends to fund the proposal to develop this national mentoring initiative; and is committed to securing significant investments by other corporations to support both the development and implementation.**
- **Request that Terrence S. Donahue and Pamela Swain, Office of Justice Programs, who designed and prepared the strategy, and three additional staff whom they have identified, be detailed for two years to the private sector to develop this initiative.**

National Corporation for Mentoring

MISSION STATEMENT

The mission of the National Corporation for Mentoring is to encourage and prepare people to establish personal relationships with other people who need encouragement and guidance in making positive changes in their lives.

PURPOSE

This strategy is designed to develop state-of-the-art mentoring services, and aggressively promote these services nationwide. It will continually advance the state of the art and stimulate innovation in the approach and delivery of mentoring services throughout the country. It would also establish an organizational structure and support capacity to sustain the services at the local level.

GOALS:

- ◆ Develop a capacity to provide effective mentoring services in every community and State in the nation.
- ◆ Promote the use of mentoring as a means to effect positive changes in the lives of troubled youths, families, and adult populations that could benefit from this type of support.

OBJECTIVES:

- ◆ To provide training, technical assistance, and instructional materials to guide the development and implementation of mentoring services in a variety of settings.
- ◆ To conduct research and development activities to improve the effectiveness of mentoring services for diverse populations.
- ◆ To provide the organizational and financial resources necessary to initiate and sustain the development of mentoring activities nationally.

STRATEGY

A public/private partnership among selected national corporations and the Federal Government would be established to secure the necessary resources for the development of a quasi-public organization known as the National Corporation for Mentoring. The Corporation would be a private, non-profit organization with corresponding amounts of public and private financial and technical resources.

In order to carry out the goals and objectives noted above, two entities would be established within the corporate structure: the National Mentoring Development Corporation and the National Academy of Mentoring Services.

The National Mentoring Development Corporation would be responsible for providing one-time financial assistance to communities and States for the development of similar private, non-profit entities within their jurisdictions. These would serve as the basis for creating mentoring services within existing public/private and private, non-profit organizations as well as creating new organizational entities as appropriate. All resources provided by the National Corporation would be matched by the community or State sponsors. State and local sponsors could be government entities, housing authorities, boys and girls clubs, police associations, schools, private corporations, etc. It would be the responsibility of the sponsors to establish an independent local development corporation which would promote and sustain mentoring activities in the various public, private, and private, non-profit organizations throughout the community.

The National Academy for Mentoring Services would be responsible for developing and disseminating effective approaches to providing mentoring services. This would include the development of training, technical assistance, and related instructional materials based on an assessment of best practice. The Academy would be designed to monitor, assess, and evaluate the effectiveness of the mentoring services and encourage innovative demonstrations involving mentoring as the principal activity.

In order to effectively initiate and sustain a national mentoring effort, the primary activities and products of the National Corporation during the first two years would be the following:

National Assessment of Mentoring Activities - The work of the Corporation should be based on the best available research, descriptive information and experience related to organizing and providing mentoring services. The assessment would consist of a literature review and an assessment of selected operational mentoring programs. The assessment would identify successful practices utilized by existing mentoring organizations. It would identify essential components of effective mentoring programs, as well as questions and issues which must be resolved to improve the quality of mentoring services for diverse populations.

Training and Technical Assistance Development - The information obtained through the assessment would be utilized to develop a training and technical assistance curriculum which describes how to organize mentoring services and how to train mentors as well as those

receiving mentoring on how to establish productive relationships. Training materials generated by the Academy would be designed to be stand-alone, self-instructional documents which encourage use and expedite implementation. In addition, results of research, development, and evaluation activities would be published in a format that provides guidance to practitioners on improving the quality of mentoring services. The information developed through these activities would also be periodically incorporated into the training materials. A toll-free hotline to respond to specific issues the mentors encounter might be established.

Research and Development(R&D) - Approximately five R&D projects would be initiated to test the training and technical assistance curriculum, and to address selected issues and questions related to improving the quality of mentoring services that were identified through the assessment. The knowledge and information developed through the R&D activities would be disseminated to provide guidance to practitioners on improving the quality of mentoring services. This information would also be used to continually update and enhance the training and technical assistance materials.

Demonstration - Approximately 10 demonstration projects would be established nationwide. Local organizations would be provided funds to support the coordination and management of the mentoring services. If successful, these projects would become regional training centers. The demonstration projects would represent a diversity of populations, among the mentors as well as those being mentored.

Evaluation - The demonstration projects would be evaluated to identify the factors that contribute to successful mentoring activities and to provide for the development of information that can be used to continually enhance mentoring services nationwide.

National Training and Technical Assistance Delivery - A national level training and technical assistance strategy would be developed and implemented to support and enhance mentoring services at the local level.

Legislation - Legislative proposals would be developed, as well as a strategy for proposing new Federal legislation and for working with Federal agencies to implement the legislation.

Complementary model legislation also would be developed to assist States and localities in establishing public/private partnerships to create local development corporations and implement mentoring services. This model legislation would be contained in an organizational module of the training and technical assistance curriculum.

Executive Order - Appropriate language, as well as a strategy for proposing the Order to the President and for working with Federal agencies to implement the order would be developed.

Private Funds - A strategy would be developed for obtaining corporate and foundation support for the National Corporation activities as well as for expanding local mentoring services. The

local focus would entail establishing partnerships with other national as well as local foundations to assist in the creation of local development corporations and services on a regional basis.

Public Funds - A strategy would be developed to obtain support from Federal, State, and local public agencies for the Corporation's activities as well as for expanding local mentoring services. (The strategy would not depend on the issuance of an Executive Order.)

National Organization Network - An organizational structure would be designed with a corresponding implementation strategy to manage and sustain the mentoring activities nationally.

SCHEDULE

The following schedule is based on the assumption that the organizational and staffing arrangements are finalized by October 15, 1994.

Activities/Products	Completion Dates	
	Strategy	Product
National Assessment of Mentoring	11/94	6/95
Training and Technical Assistance Curriculum	12/95	9/95
Legislative Strategy	2/95	5/95
Executive Order Strategy	2/95	5/95
Private Funding Strategy	1/95	ongoing
Public Funding Strategy	2/95	ongoing
Research and Development Program	3/95	9/95
National Training and Technical Assistance Delivery	7/95	10/95
Demonstration Program	9/95	12/95
Evaluation	9/95	12/95
National/State/Local Organizational Strategy	3/95	9/96

IMPLEMENTATION CONSIDERATIONS

This strategy would be initiated with private funds. It could be expanded through legislation, executive order, as well as partnerships with other public and private organizations. It would be important to establish the National Corporation, as defined in this document, as an inducement for other public and private agencies to become partners and invest their resources. By initiating all of the activities identified above, the National Corporation would represent a highly defined and diverse investment opportunity. This approval should expedite negotiations and decisions to commit resources to this venture in mentoring.

DEVELOPMENTAL UNIT

Staffing of the National Corporation would be limited to a very small core paid professional staff, supplemented by loaned executives and other professionals from the public and private sectors. Local development corporations would consist of a small paid coordination unit and, otherwise, staffed primarily with volunteers. Individual mentoring activities within the community organizations and corporations would be organized and operated on a volunteer basis.

A developmental unit composed of individuals detailed from public and/or private organizations for a two-year period would be responsible for designing and implementing the core components of the National Corporation for Mentoring. As envisioned in the proposal and budget, the unit would consist of two senior staff, two to three mid-level staff, and a secretary. Assuming successful performance of their responsibilities, these individuals would be given the opportunity of becoming full-time employees of the National Corporation. In order to secure high calibre personnel, temporary or permanent promotions and/or bonuses ought to be provided to induce detailees to participate in the venture.

BUDGET

PURPOSE	FUNDING LEVEL
Program Costs	
National Assessment	\$150,000
Training and Technical Assistance Development	\$75,000
Research and Development 5 sites @ \$50,000 Evaluation @ \$350,000	\$600,000
Evaluation (2 yrs.)	\$500,000
National Training and Technical Assistance Delivery (2 yrs.)	\$50,000
Subtotal	\$1,325,000
Consultation Costs	
Legislative Strategy	\$50,000
Executive Order	
Private Funding Strategy	
Public Funding Strategy	
National Organization	
Subtotal	\$50,000
Administrative Costs	
Personnel ¹	
bonuses	\$70,000
salary	\$25,000
Travel	\$25,000
Rent/Utilities	\$125,000
Subtotal	\$235,000
TOTAL	\$1,620,000

¹All staff would be on non-reimbursable IPAs except for secretary. The bonuses are to compensate for the risk involved in interrupting careers.

DEVELOPMENT STRATEGY

NATIONAL ASSESSMENT - An organization would be selected and provided funding to conduct the activities listed below.

Major Activities:

- Literature Review;
- Mail/telephone survey of up to 30 programs;
- Site Visits to 6 programs;
- Analysis of information; and
- Preparation of Report.

Options: The estimate for the national assessment is the same under each option.

TRAINING AND TECHNICAL ASSISTANCE DEVELOPMENT AND DELIVERY - An organization would be selected and provided funding to conduct the activities listed below.

Major Activities:

- Review existing curricula;
- Curriculum Outline and list of resource materials;
- Draft curriculum and resource materials based on assessment results;
- Identify trainers and technical assistance programs;
- Pilot test of curriculum;
- Training and technical assistance to the Weed and Seed sites; and
- Dissemination strategy.

Options - The estimate for training and technical assistance is the same under each option.

RESEARCH AND DEVELOPMENT - Sites would each receive \$50,000 either directly or through a contractor to conduct the following activities. A research organization would be selected to conduct the evaluation activities listed below.

Major Activities - Development:

- Direct development and implementation of local project based on design standards conveyed through the training and technical assistance curriculum;
- Develop local funding sources;
- Monitor project implementation to ensure adherence to design standards and document project implementation activities;
- Participate in evaluation; and
- Make project adjustments based on evaluation reports.

Major Activities - Evaluation:

- Design - including instrument development and pretesting;
- Baseline data collection;
- Support to program development and implementation e.g., defining eligibility criteria and conducting participant assessments;
- Periodic reports; and
- Monitoring design implementation.

Options: Under options 1, 2, 3, and 4 it estimated that five R&D sites would be supported. Under Option 5, depending upon the requirements placed on the available funds, either two sites, or one site in Los Angeles would be supported (\$100,000 for development and \$200,000 for evaluation).

DEMONSTRATION - Sites would each receive \$25,000 either directly or through a contractor to conduct the following activities. Each demonstration site would be required to contribute a minimum of \$25,000 initially, as well as identify additional local funds to support implementation. The best of the R&D and demonstration sites would become a network of training centers to promote nationwide implementation.

The evaluation design and instrumentation developed under the Research and Development component would be utilized to evaluate the demonstration projects.

Major Activities: Development

- Direct development and implementation of local project;
- Develop local funding sources;
- Monitor project implementation;
- Facilitate evaluation; and
- Make project adjustments based on evaluation reports.

Major Activities - Evaluation:

- Data Collection; and
- Periodic analysis and Reporting.

Option: The demonstration components can only be supported under options 1, 2, and 3. The evaluation would be funded for two years under option 1 and 1 year under option 2.

BUDGET

PURPOSE	FUNDING LEVEL				
	Option 1	Option 2	Option 3	Option 4	Option 5
Program Costs					
National Assessment (total cost)	\$150,000	\$150,000	\$150,000	\$150,000	\$150,000
Training and Technical Assistance Development (total cost)	\$250,000	\$250,000	\$250,000	\$250,000	\$250,000
Research and Development sites @ \$50,000/yr	\$750,000 5 sites/3yrs.	\$500,000 5 sites/2yrs.	\$250,000 5 sites/1yr.	\$250,000 5 sites/1yr.	\$100,000 2 sites/1yr.
Evaluation @ \$350,000/yr	\$1,400,000 5 sites/4yrs.	\$1,050,000 5 sites/3 yrs.	\$700,000 5 sites/2yrs.	\$700,000 5 sites/2yrs.	\$200,000 2 sites/2 yr.
Demonstration sites @ \$25,000/yr	\$750,000 10 sites/3yrs.	\$500,000 10 sites/2 yrs.	\$250,000 10 sites/1yr.	- 0 -	- 0 -
Evaluation \$250,000/yr	\$750,000 10 sites/3yrs.	\$500,000 10 sites/2yrs.	\$500,000 10 sites/2yrs.	- 0 -	- 0 -
Subtotal	\$4,050,000	\$2,950,000	\$2,100,000	\$1,350,000	\$700,000
Consultation Costs (total cost)					
Legislative Strategy	\$50,000				
Executive Order					
Private Funding Strategy					
Public Funding Strategy					
National Organization					
Subtotal	\$50,000				
Administrative Costs (per year)					
Personnel ¹	(\$300,000) \$70,000 \$25,000				
salaries (DOJ)					
bonuses					
salary					
Travel	\$25,000				
Rent/Utilities/Supplies	\$140,000				
Subtotal	\$260,000				
TOTAL	\$4,360,000	\$3,260,000	\$2,410,000	\$1,660,000	\$1,010,000

¹All staff would be on non-reimbursable IPAs except for secretary. The bonuses are a one time compensation for the risks assumed by the employees.