

2011-2012 COMPASS CLIENT APPLICATION

1. Introduction

Thank you for your interest in applying for a Compass project. Compass grants pro bono consulting services to nonprofits that benefit the Greater Washington community. Each nonprofit client receives approximately \$106,000 of strategic consulting services - free of charge. This year, we expect to select 25-30 clients.

DEADLINE: The deadline for client applications is Wednesday, June 15, 2011 at 5:00 p.m.

ELIGIBILITY: 501(c)3 nonprofit organizations in the Greater Washington area may apply if they have a minimum operating budget of \$750,000, three full-time paid staff members, a board of directors, and a mission that benefits the Greater Washington community. Compass does not accept clients that promote a specific religion, or religious or political beliefs.

SELECTION CRITERIA: Compass looks for indications that a potential consulting engagement will be completed successfully and have lasting, meaningful impact. Those indications include financial stability, regular Board meetings, capacity of the Executive Director to participate in the project, an engaged Board Chair interested in the proposed project, a well-defined and realistic project scope, and a track record of community impact.

When selecting the final roster of clients, Compass looks for geographic diversity (DC, MD, VA) but not too far from the immediate metropolitan area, service line diversity, and clients that represent a wide range of issue areas.

Compass rarely accepts clients who have an interim Executive Director or who are about to transition to a new Executive Director. Compass will defer a project if the Executive Director leaves during the project.

REPEAT CLIENTS: We encourage past clients to apply for a second or third project. However, we prefer clients to take at least one year off between projects.

TIMING OF CLIENT SELECTION AND PROJECTS: In July, Compass representatives will contact and interview (separately) the Executive Director and Board Chair of applicants that meet our basic criteria. Compass will announce final client selections in August.

Project Leaders, recruited in September, will begin working with clients in September and October. Teams will be formed, trained, and begin working in earnest in the late fall, with projects completed by June 2011.

Please mark October 4 for the annual PROJECT LAUNCH event where prospective volunteers find out more about Compass' newly selected clients and projects.

CONFIDENTIALITY: All information in this application will be kept confidential within Compass, the Client Selection Committee, our partnering organizations, and if selected, with the project leader and team.

QUESTIONS: If you have any questions after viewing the application, please feel free to contact me. I would be happy to talk to you about the best way to complete this application, and particularly about the best way to think about and present the scope of the project you are requesting.

Thanks again for your interest in Compass.

Suzanne Laporte
Executive Director
Compass
(202) 459-6291
slaporte@compassdc.org

2.

IMPORTANT INSTRUCTIONS

1. Before you begin this application, we recommend you download a copy of the application from our website at www.compassdc.org/nonprofits/nonprofit-application-process.html.

2. Please complete the application off-line and save a copy. Then cut and paste responses into this Survey Monkey application.

Some questions require detailed, carefully thought-out responses. Completing the the questions off-line will allow easy editing before you submit the application. It also ensures that you have a copy for your files.

3. Before beginning the application, please make sure both the Executive Director and Board Chair are aware of this application for consulting services and agree on the requested project. Ideally, both people should review the application before it is submitted.

4. Once you begin the application, you can make changes to it as long as you return to the application from the same computer. Please **DO NOT START A SECOND APPLICATION**, and do not make changes after the deadline (June 15).

However, we highly recommend completing the application off-line and then completing the final application here in one sitting.

5. We also highly recommend that the Executive Director and Board Chair read the application before their interview with Compass.

2011-2012 COMPASS CLIENT APPLICATION

3. Applicant Information

1. General Contact Information (full mailing address is required)

Organization	<input type="text"/>
Street Address	<input type="text"/>
Street Address cont.	<input type="text"/>
City, State, Zip	<input type="text"/>
Phone	<input type="text"/>
Ward (if DC)	<input type="text"/>
County	<input type="text"/>
Website	<input type="text"/>
Executive Director	<input type="text"/>
ED Phone	<input type="text"/>
ED Email	<input type="text"/>

2. Person completing application

Name	<input type="text"/>
Title	<input type="text"/>
Phone	<input type="text"/>
Email	<input type="text"/>

3. Has your organization been a Compass client in the past?

Yes

No

If yes, please include year of project and service line.

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

4. How did you hear about Compass?

(Please indicate the name of the organization or individual from whom you heard about Compass.)

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

5. FOR ALL APPLICANTS LOCATED IN ALEXANDRIA: ACT for Alexandria partners with Compass to guarantee 1-2 projects in the city of Alexandria every year. These applications are considered in a smaller, separate pool from all other Compass applications. Please check here if you would like to be considered for an ACT-sponsored Compass project.

Yes

No

N/A

2011-2012 COMPASS CLIENT APPLICATION

4. Compass Criteria

6. Please verify that your organization meets the following criteria required for all Compass projects. (If you answer "No" to any of the following questions, please contact Compass Executive Director, Suzanne Laporte, before continuing the application.)

	Yes	No
Non-profit: IRS 501(c)3	jn	jn
Mission: Focuses on communities in the Greater DC area.	jn	jn
Mission: Does not promote a religion, or specific religious or political beliefs.	jn	jn
Size: At least 3 full-time paid staff (or FTEs), a Board of Directors, and an annual operating budget of at least \$750,000.	jn	jn
Commitment: Senior staff person able to commit 8 to 10 hours per month as point of contact and project liaison.	jn	jn
Commitment: Will provide most recent 990 and quarterly financials, strategic plans, organizational charts, and other relevant documents to team.	jn	jn
Commitment: Board Chair and ED willing to take active role with project leadership, as needed.	jn	jn
Commitment: Will allow team to share final recommendations with entire board or relevant subset of the board.	jn	jn
Commitment: ED and/or Board Chair will attend the mandatory Compass Project Launch event on October 4 and End-of-Project Celebration in late May or early June.	jn	jn
Commitment: Staff and board may receive Compass newsletters and mailings.	jn	jn
Project Selection: Both ED and Board Chair can	jn	jn

2011-2012 COMPASS CLIENT APPLICATION

participate in phone
interviews in July with
Project Selection
Committee.

Reporting: Will furnish
written report on project to
Compass by July 15, 2012.

Outcomes: Will complete
Compass survey two years
after conclusion of project.

jn

jn

jn

jn

7. If Compass completes a project for you, are you willing to recognize Compass in a newsletter, annual report or other external communications?

Yes

No

5. Mission

8. What is the mission of your organization?

9. Briefly describe the primary programs/services offered by your organization. (Feel free to use bullet points.)

10. Please quantify and describe the number of beneficiaries you serve or reach each year.

11. Does your organization follow a written strategic plan? If so, when was it developed and what time frame does it cover?

12. What are the major elements of your organization's strategy? (Feel free to use bullet points.)

2011-2012 COMPASS CLIENT APPLICATION

6. Organization and Finance

13. How many paid full-time staff do you employ?

14. How many board members do you currently have?

15. Please list your board committees.

16. Please provide a) your current year's forecasted annual budget, and b) last year's actual budget amount.

17. Briefly describe the financial stability of your organization. Address issues such as whether you operated in the black for the past few years, have extensive debt obligations, etc.

18. How long has your organization been in existence as a 501(c)3?

19. How does your organization measure impact and outcomes?

20. If your organization has used other management consultants in the past three years, what services were provided?

21. If selected as a Compass client, do you anticipate using other consultants during 2011-2012? If yes, please elaborate.

2011-2012 COMPASS CLIENT APPLICATION

7. Service Line Choice

This year, Compass is offering consulting services in five service areas - Board Development; Funding Strategies; Strategic Alignment; Strategic Planning (two-year projects), and Strategic Partnerships and Mergers.

Please check ONLY ONE service line below, and then on the following pages, be as specific as possible in describing the project scope, objectives, challenges, and activities involved, as well as the staff involved and any time frame parameters. This project will be staffed with volunteers - many of whom have full-time jobs. The more specific you are about the project you need, the more successful the project will be. Please try to narrow your request to a single project that can be accomplished in the amount of time available.

We realize you may need help in more than one area. However, you can only select one service line per year.

22. BOARD DEVELOPMENT

The goal of a Board Development project is to improve board effectiveness and engagement to sustain a high performing board. While a periodic self-assessment is an important function for every Board, it can be difficult for a Board to review itself. The Compass team can help provide a closer, dispassionate evaluation in conjunction with the Board Chair, Executive Director and Board members. The team helps the Board build a solid foundation of governance, recruitment, training, committee structure, and meeting and committee practices. It helps the Board develop an appropriate style given its current membership and organizational needs. The team provides best practices for Board operations. The team works with the Board to develop an action plan to guide the transformation to a higher level of performance, and positions the Board Chair and Executive Director to oversee its accomplishment.

Yes

No

23. FUNDING STRATEGY

Strategic planning and governing boards drive funding strategies. Therefore, Funding Strategy projects work best for, and Compass will only deploy teams to, nonprofits that have a strategic plan in place and a strong governing board. Funding strategy projects begin with an assessment of current revenue sources and revenue-generation methods. The team then reviews alternative revenue sources as well as opportunities with existing targets and sources. The project ends with an improvement plan based on nonprofit best practices together with a tailored approach that is aligned with the organization's mission, strategy, needs, and resources.

Yes

No

2011-2012 COMPASS CLIENT APPLICATION

24. STRATEGIC ALIGNMENT

For success in today's challenging environment, nonprofits need to have a clear understanding of their strategic goals so the entire organization is aligned towards those goals. Compass helps clients examine their mission, vision, targeted beneficiaries, desired changes, strategic objectives and supporting activities to understand how to achieve the greatest impact. Strategic alignment projects also look, at a high level, for alignment between the allocation of financial/staff resources and strategic priorities. The exact focus of individual projects varies depending on the client's current planning process. The result will be a plan to improve the organization's strategic alignment and potential for success.

Yes

No

25. STRATEGIC PLANNING

Strategic Planning is a TWO YEAR PROJECT. This service line is for organizations that would like help with their strategic planning process, in particular, ensuring that the board and organization leadership are aligned around key choices that have to be made. Typically, the first year will be spent 1) gathering input from key stakeholders on the issues to be addressed in the strategic planning process, and 2) conducting research to help the board and leadership make informed decisions about those choices. Based upon the team's research, the second year will be spent walking the board through the strategic planning process of making important choices, prioritizing goals, and understanding the implications of those choices. The final product may not be a formal strategic planning document. However, Compass will move the organization forward on the identified issues.

Yes

No

Note: Only a few organizations will be selected for a 2-year project. If not selected, would you like to be considered for Strategic Alignment instead?

2011-2012 COMPASS CLIENT APPLICATION

26. STRATEGIC PARTNERSHIPS AND MERGERS

In this weak economy, many nonprofits are concerned about the uncertainty that surrounds their traditional funding streams and the resulting impact on their current activities and future plans. For nonprofits interested in options that involve combining resources with another nonprofit, Compass will assist in assessing the value and appropriateness of strategic mergers, partnerships, or other shared operating arrangements. Financial and cultural issues will be considered. Compass will recommend potential actions for the board and senior management to consider along, with an analysis of the resulting implications for both organizations.

Yes

No

2011-2012 COMPASS CLIENT APPLICATION

8. Project Details

27. Do you feel that the project can be accomplished within a 5-6 month timeframe by a group of approximately 6 to 8 volunteers working 8 to 16 hours per volunteer per month?

Yes

Maybe

No

28. Please describe the project objectives and proposed activities.

29. Please describe the potential impact on your organization.

30. Do you have a specific "deliverable" or "end product" in mind?

31. Do the Board, Executive Director and appropriate staff in your organization currently have the capacity to: (1) support the project team and provide input during this time frame, and (2) implement any approved plans or recommendations that the team delivers at the conclusion of the project?

Yes

Maybe

No

32. Please specify any special skills or competencies required or especially helpful for this project (e.g., experience in your nonprofit field, marketing, finance, technology, etc.).

33. Are there specific challenges that will need to be managed? We appreciate your candor, to help ensure success in planning and staffing the project.

2011-2012 COMPASS CLIENT APPLICATION

34. Compass strongly suggests that volunteer teams get early exposure to the direct service provided by nonprofit clients as a way to learn more about the organization that they are serving. Please describe a way in which your organization could provide volunteers with this exposure in November 2011 - January 2012.

2011-2012 COMPASS CLIENT APPLICATION

9. Leadership

35. How long has the Executive Director been in this position?

36. Please provide a short bio of the Executive Director.

37. How long has the Board Chair been in this position, and when does his/her term end?

38. How will the Executive Director and the Board of Directors support this project? Please be specific.

39. Have the Executive Director and Board Chair read this application?

Yes

No

40. Board Chair Contact Information

Name	<input type="text"/>
Address	<input type="text"/>
City, State, Zip	<input type="text"/>
Phone	<input type="text"/>
Email	<input type="text"/>

41. Designated Staff Contact Information, if other than Executive Director.

Name	<input type="text"/>
Title	<input type="text"/>
Phone	<input type="text"/>
Email	<input type="text"/>

2011-2012 COMPASS CLIENT APPLICATION

10. Next Steps

Thank you very much for submitting a Compass client application. We are excited by your interest in a Compass project!

REMINDER: The deadline for client applications is June 15, 2011 at 5:00 p.m.

SUPPORTING MATERIAL: Once your application has been submitted, please send a list of board members and their affiliations, as well as your most recent annual report, to Compass. Please include any supporting material about your organization such as brochures, articles, etc. to help the Selection Committee understand your organization better. Mail to: Compass, 1350 Connecticut Avenue, NW, Suite 900, Washington, DC 20036.

ADDITIONAL INFORMATION: The Client Selection Committee will contact Executive Directors and Board Chairs for interviews in July, and make final selections by the end of August. Once projects are selected, we recruit Project Leaders. Project Leaders work with clients in September and October to develop the project scope. Teams will be formed, trained and begin work in earnest in late fall, with projects completed by June 2012.

For ACT-sponsored projects, ACT staff will serve as a liaison to awardees' staff and Compass Project Leaders, and will receive copies of project agreements and mid-year & final reports.

Please mark your calendars for the evening of Thursday, October 4 for the Project Launch event where prospective volunteers find out more about our newly selected clients and projects.

Please contact me with any questions. Thank you again for your interest in Compass!

Suzanne Laporte
Executive Director
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