

2019-2020 COMPASS CLIENT APPLICATION INSTRUCTIONS PHILADELPHIA

1. INTRODUCTION

Thank you for your interest in applying for a Compass pro bono consulting project. Compass grants pro bono consulting services to nonprofits that benefit the Greater Philadelphia community. Each nonprofit client receives approximately \$150,000 of strategic consulting services - free of charge. This year, we expect to select 15 nonprofits.

IMPORTANT: PLEASE READ BEFORE PROCEEDING

Please read through the instructions below before viewing the application. This section explains eligibility requirements. Section Two includes technical guidance on completing this application in Survey Monkey. **(PLEASE READ APPLICATION IN WORD OR AS A PDF BEFORE ACCESSING APPLICATION IN SURVEY MONKEY)**

DEADLINE: The deadline for client applications is Friday, June 7, 2019 at 5:00 p.m.

ELIGIBILITY: 501(c)3 nonprofit organizations in the Greater Philadelphia area may apply if they have a minimum operating budget of \$750,000, three full-time paid staff members, an active board of directors, and a mission that benefits the Greater Philadelphia community. Compass does not accept clients that promote specific religious or political beliefs. Organizations that apply for Funding Strategy or Marketing Strategy projects must have a current Strategic Plan. For other service lines, this is not a requirement. Currently, Compass works with nonprofits in the following Pennsylvania counties: Philadelphia, Bucks, Chester, Delaware, Montgomery, and Camden County in New Jersey.

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. Compass does not undertake projects with organizations who anticipate working with other pro bono or paid strategy or management consultants during the Compass project (September 2019-June 2020).

When selecting the final roster of clients, Compass looks for geographic diversity (PA, NJ) 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 are about to transition to a new Executive Director. Compass will defer a project if the Executive Director leaves during the project period (September 2019-June 2020).

REPEAT CLIENTS: We encourage past clients to apply for additional projects. However, most clients benefit from taking a year off between projects.

CLIENT SELECTION AND PROJECT TIMELINE: Over the summer, Compass representatives will contact and interview (separately) the Executive Director and Board Chair of applicants that meet the basic criteria, listed above. Compass will announce final client selections in August.

Project Leaders will begin working with clients in September. Teams will be fully formed, trained, and begin working in earnest in late October, with projects completed by late May to early June 2020. Please keep in mind that we will host our annual PROJECT LAUNCH on October 3, 2019 at 6:30 pm. This event is a chance for prospective volunteers to meet Compass' clients and learn about the projects. Clients are **REQUIRED** to attend this event.

CONFIDENTIALITY: All information in this application will be kept confidential within Compass, the Client Selection Committee, and if selected, within the project 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.

Thank you again for your interest in Compass.

Beth Dahle
Executive Director
(610) 745-3223
bdahle@compassphilly.org

2. IMPORTANT TECHNICAL INSTRUCTIONS

(PLEASE READ BEFORE ACCESSING APPLICATION IN SURVEY MONKEY.)

1. Before you begin this application, please download the PDF or Word version of the application from our website at: <https://compassprobono.org/philadelphia/nonprofits/>

2. Some questions require detailed, carefully thought-out responses. Completing the questions off-line will allow easy editing before you submit the application. The Word document will serve as your copy of the application and should be shared with the Executive Director and Board Chair before their interviews.

PLEASE NOTE: Sometimes applicants experience challenges when starting an application in Survey Monkey then exiting and trying to re-enter. To avoid this problem, please complete the application off-line first, and then cut and paste into Survey Monkey **IN ONE SITTING**. Then click the "APPLY NOW" button.

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. Both people should review the application before it is submitted.

4. Once you begin the application, you may be able to make changes to it as long as you return to the application from the same computer. However, we highly recommend drafting the application off-line and then completing the final application in Survey Monkey in one sitting. **PLEASE DO NOT START A SECOND APPLICATION**. Please contact Megan Tomey (mtomey@compassphilly.org) with any technical problems or questions.

5. **IMPORTANT:** Both the Executive Director and Board Chair should read this application before their interview with Compass over the summer.