



2020-2021 COMPASS CLASSIC CLIENT APPLICATION GREATER PHILADELPHIA

Thank you very much for your interest in applying for a Compass pro bono consulting project. Your time is valuable, and we aim to make this process as efficient as possible for you. Please read this section carefully before proceeding to the application.

APPLICATION DEADLINE: Friday, July 24, 2020 at 5:00 p.m. We will be reviewing applications on a rolling basis and strongly encourage you to submit early.

CHECK YOUR ORGANIZATION'S ELIGIBILITY

Please be sure that your organization meets each of Compass' eligibility requirements. If you are not certain you qualify, please contact Compass before proceeding.

ELIGIBILITY REQUIREMENTS:

- Registered IRS 501(c)3 nonprofit
- Local mission - nonprofit work benefits Greater Philadelphia in the following counties: Philadelphia, Montgomery, Chester, Delaware, Bucks, and/or Camden.
- Mission does not promote specific religious beliefs or political party/movement.
- Minimum annual operating budget of \$500,000.
- Active Board of Directors.

INTRODUCTION

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. **We strongly encourage you to set up time to discuss project ideas and/or your organizational priorities with us.** When more than one type of project sounds appropriate or you have questions about project scope, we welcome the opportunity to provide input and simplify the application process for you.

SELECTION CRITERIA: Compass looks for indications that a potential consulting engagement will be completed successfully and have lasting, meaningful impact. These indications include organizational stability, regular Board meetings, capacity of the Executive Director to participate in the project, an engaged Board Chair supportive of 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, service line diversity, and clients that represent a wide range of issue areas.

Compass does not undertake projects with organizations who anticipate working with other pro bono or paid strategy or management consultants during the Compass project.

CLIENT SELECTION AND PROJECT TIMELINE: Over the summer as applications are received, Compass representatives will contact and interview the Executive Director and Board Chair of applicants that meet the required criteria. We will announce final client selections in mid-August. Project Leaders begin working with clients in late September, and teams are formed, trained, and begin working in mid-October. Projects are completed by June 2021.

APPLICATION INSTRUCTIONS & SUPPORT

Before you begin this application in SurveyMonkey, please download the PDF and Word versions of the application:

- PDF Document (Current document): The PDF version allows you to read the entire application, including all project descriptions, without completing and advancing through various pages (as required in SurveyMonkey).
- Word Document: Sometimes applicants like to work on the application off-line for easy editing and sharing internally, so we provide a Word version. **If you use the Word version of the application, please copy and paste your responses into the SurveyMonkey application as we cannot accept the Word version as your submission.**

Please contact Megan Tomey (mtomey@compassphilly.org) with any technical problems or questions.

THANK YOU

Thank you again for your interest in Compass. We hope you will not hesitate to reach out to us!

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

Anne Randig Andres
Program Manager
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(610) 986-6247

Megan Tomey
Assistant Program Manager
mtomey@compassphilly.org
(617) 957-9182

APPLICANT INFORMATION

1. Organization Name:
2. Contact Information
 - Street Address:
 - Street Address (cont.):
 - City:
 - State:
 - Zip:
 - County:
 - Phone (ex: 555-555-5555):
 - Website:
3. Person Completing Application
 - Title (Mr., Ms., Dr., etc.):
 - Full Name:
 - Job Title:
 - Phone (ex: 555-555-5555):
 - Email:
4. Executive Director Contact Information
 - Title (Mr., Ms., Dr., etc.):
 - Full Name:
 - Job Title (ED, CEO, President, etc.):
 - Office Phone + Ext (ex: 555-555-5555 x000):
 - Alternate Phone (ex: 555-555-5555):
 - Email:
5. How long has the Executive Director been in this position?
6. Do you expect the Executive Director to continue in this position through June 2021?
 - Yes
 - If No or Unsure, please explain:
7. Please provide a short biography of your organization's Executive Director. (100 words)
8. Current Board Chair Contact Information
 - Title (Mr., Ms., Dr., etc.):
 - Full Name:
 - Home Address:
 - Home Address (cont.):
 - Home City, State, Zip:

Phone (ex: 555-555-5555):

Email:

Company:

Title at Company:

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

10. If your Board Chair's term will expire between June 2020 and June 2021, does the incoming Board Chair support the Compass project?

Yes

Not Applicable

If No or unsure, please explain:

11. If your Board Chair's term will expire between June 2020 and June 2021, when will the transition occur? (Approximate month/year)

12. If the Board Chair's term will expire between June 2020 and June 2021, and the incoming Board Chair has been chosen, please provide his/her name and contact information.

Title (Mr., Ms., Dr., etc.):

Full Name:

Home Address:

Home Address (cont.):

Home City, State, Zip:

Phone (ex: 555-555-5555):

Email:

Company:

Title at Company:

13. How did you hear about Compass?

We are a previous Compass Client

We are a previous Compass Applicant (not selected)

Online search

LinkedIn or other social media

Referral from Foundation, Community Partner, Nonprofit, Individual or Other
(Please share name of referral source):

COMPASS CRITERIA

14. Please verify that your organization meets the following criteria required for all Compass projects. *(If you answer "Disagree" or are not sure how to respond to any of the following statements, please contact Anne Andres, Program Manager, before continuing the application.)*

	Agree	Disagree
We are an IRS 501(c)3 nonprofit.		
We have a local mission - our work benefits Greater Philadelphia in the following counties: Philadelphia, Montgomery, Chester, Delaware, Bucks, and/or Camden.		
Our mission does not promote specific religious beliefs or political party/movement.		
We have a minimum annual operating budget of \$500,000.		
We have an active Board of Directors.		
We will provide documents to the Compass team (e.g., financial statements, strategic plans).		
Both the Executive Director and Board Chair will participate in interviews over the summer with a member of the Client Selection Committee.		
We will provide opportunities for the Compass team to attend Board meetings.		
We will allow the Compass team to present final recommendations to the Board.		
The Executive Director will attend the Client Orientation in mid-September 2020.		
The Executive Director will complete Mid-Project and End-of-Project Surveys.		
We will complete the Compass Impact Survey one to two years after the end of the project.		
The Board Chair, Executive Director, and relevant staff are committed to four to eight hours per month as the main points of contact or project liaisons.		

If you answered "Disagree" for any of the statements above, please explain.

MISSION

15. What is your organization's mission statement?
16. What is the primary issue area in which your organization works? (Please select one)
- | | |
|---------------------------------------------------------------------------------------|---------------------------------------------------|
| <input type="checkbox"/> Animal Welfare | <input type="checkbox"/> Food Security |
| <input type="checkbox"/> Anti-violence / Violence Interruption | <input type="checkbox"/> Health Care |
| <input type="checkbox"/> Arts and Culture | <input type="checkbox"/> Housing and Homelessness |
| <input type="checkbox"/> Children and Youth | <input type="checkbox"/> Human Services |
| <input type="checkbox"/> Disability Services | <input type="checkbox"/> LGBTQ+ |
| <input type="checkbox"/> Economic Development | <input type="checkbox"/> Racial Equity |
| <input type="checkbox"/> Education | <input type="checkbox"/> Senior Services |
| <input type="checkbox"/> Environment | <input type="checkbox"/> Social Justice |
| <input type="checkbox"/> Financial Literacy / Entrepreneurship / Economic Empowerment | <input type="checkbox"/> Veteran Services |
| | <input type="checkbox"/> Workforce Development |
| | <input type="checkbox"/> Other (please specify) |
17. What are the secondary issue areas in which your organization works? (Check all that apply)
- | | |
|---------------------------------------------------------------------------------------|---------------------------------------------------|
| <input type="checkbox"/> Animal Welfare | <input type="checkbox"/> Food Security |
| <input type="checkbox"/> Anti-violence / Violence Interruption | <input type="checkbox"/> Health Care |
| <input type="checkbox"/> Arts and Culture | <input type="checkbox"/> Housing and Homelessness |
| <input type="checkbox"/> Children and Youth | <input type="checkbox"/> Human Services |
| <input type="checkbox"/> Disability Services | <input type="checkbox"/> LGBTQ+ |
| <input type="checkbox"/> Economic Development | <input type="checkbox"/> Racial Equity |
| <input type="checkbox"/> Education | <input type="checkbox"/> Senior Services |
| <input type="checkbox"/> Environment | <input type="checkbox"/> Social Justice |
| <input type="checkbox"/> Financial Literacy / Entrepreneurship / Economic Empowerment | <input type="checkbox"/> Veteran Services |
| | <input type="checkbox"/> Workforce Development |
| | <input type="checkbox"/> Other (please specify) |
18. Please describe the populations you serve, and quantify the number of beneficiaries each year. Approximately what percentage of the people you serve are low-moderate income? (100 words)
19. In what counties or neighborhoods do you provide services?
20. Please list and briefly describe the primary programs/services offered by your organization. (Please use bullet points, 200 words)

21. How do you measure the impact of your programs/services? (150 words)

ORGANIZATIONAL AND FINANCIAL DETAILS

22. What year did your organization receive its 501(c)3 IRS tax determination status?
23. How many paid, full-time staff do you employ?
24. How many paid, part-time staff do you employ?
25. Does your organization have a Development Director?
- Yes
 - No
 - Other (please specify):
26. How many board members do you currently have?
27. Are all board members required to contribute financially to your organization each fiscal year?
- Yes
 - No
- If yes, what is the required "give or get" amount for board members?*
28. Approximately what percentage of board members contributed to your organization last year?
29. Please provide the following financial information for three fiscal years. If you are a chapter or affiliate of a national organization, please provide your local budget.
- TOTAL budgeted revenue for the current fiscal year:
 - TOTAL budgeted expenses for the current fiscal year:
 - TOTAL revenue for the most recently completed fiscal year:
 - TOTAL expenses for the most recently completed fiscal year:
 - TOTAL revenue for the second to last completed fiscal year:
 - TOTAL expenses for the second to last completed fiscal year:
- Please provide any additional information about how recent events may be affecting your budget:*
30. Please indicate if you currently receive funding from the following foundations.
- The Barra Foundation
 - Connelly Foundation
 - The Foundation for Delaware County
 - Dolfinger-McMahon Foundation
 - The Alfred and Mary Douty Foundation
 - Genuardi Family Foundation
 - Independence Foundation

- The Patricia Kind Family Foundation
- The Pew Charitable Trusts
- The Philadelphia Foundation
- Scattergood Foundation
- United Way
- William Penn Foundation
- Other (please specify)

PROJECT CHOICE

Compass is offering consulting projects in the following areas: Board Development, Funding Strategy, Partnerships, Collaborations, & Mergers, Strategic Alignment, Strategic Marketing, and, new this year, Decision Support.

Each Compass project is tailored to address the unique challenges your organization is facing and provides the support you need to make informed choices. While it's not required, we strongly encourage you to set up a project scoping call with Anne Andres, Program Manager, prior to completing an application. We welcome the opportunity to listen to your concerns and priorities and help determine the best type of project for your organization now, as well as to simplify completing this application.

Please read the Service Line descriptions and select the project that best represents the top priority for your organization.

31. Project Choice (Please select one project type)

Decision Support

As nonprofit leaders navigate the ongoing impact of COVID-19, many will need to make significant decisions and trade-offs over the next 12 months. Our new Decision Support Projects are designed to provide flexible consulting support to nonprofit leaders as they address challenges created by the crisis and focus on recovery and rebuilding. Whereas our other project options provide deep analysis and recommendations in one focus area (Service Line), Decision Support Projects can address priorities in several different areas. A Compass team can 1) generate data, analyze information, and create frameworks to support decision-making, 2) evaluate the consequences of course adjustments, 3) establish a communications plan around decisions made, and finally 4) help nonprofits plan for recovery, rebuilding, and ultimately greater sustainability.

Board Development

The goal of a Board Development project is to improve effectiveness and engagement to sustain a high-performing Board. Compass can provide an objective evaluation of Board operations and offer recommendations for best practices to build a solid foundation of governance, recruitment, training and committee structures. Compass can help the Board develop an appropriate style given its current membership and organizational needs, and offer guidance regarding leadership succession planning and strategies for involving the Board in development efforts.

Funding Strategy

Funding Strategy projects assess revenue sources and revenue generation methods and can provide guidance to broaden or deepen current sources of revenue, recommend untapped sources for funding and screen out less promising avenues. Compass can also evaluate earned income ideas and offer recommendations to improve external communications.

Partnerships, Collaborations & Mergers

To make more efficient use of resources, nonprofits may consider partnering with other organizations with complementary expertise and strengths to fulfill a common mission. Compass can help assess the value and appropriateness of strategic partnerships, collaborations, or mergers and offer recommendations and an analysis of resulting implications.

Strategic Alignment

Compass can help nonprofits examine their mission, vision, programs, targeted beneficiaries, desired changes, strategic objectives and supporting activities to understand how to achieve the greatest impact. Strategic Alignment projects can examine the allocation of financial and staff resources across programs with regard to organizational priorities and can also help evaluate opportunities for service or program development. These projects can also help ensure that the Board and organization leadership are aligned around mission, vision, and key choices in preparation for strategic planning and/or long-term goal setting. The exact focus of individual projects varies depending on a nonprofit's needs and situation with tailored recommendations to improve the organization's strategic alignment and potential for success.

Strategic Marketing

To help fulfill its mission and vision, Compass can help nonprofits identify opportunities for services and programs in existing and new markets. Compass can help create a positioning statement and develop an effective marketing strategy to take advantage of new opportunities. The project does not include collateral development.

IMPORTANT NOTE – PLEASE READ

BASED ON YOUR RESPONSE FOR QUESTION 31, PLEASE ONLY FILL OUT THE SECTION CORRESPONDING WITH THE SERVICE LINE OF CHOICE

Please proceed to the following pages depending on Service Line:

- DECISION SUPPORT: page 13
- BOARD DEVELOPMENT: page 15
- FUNDING STRATEGY: page 17
- PARTNERSHIPS, COLLABORATIONS AND MERGERS: page 19
- STRATEGIC ALIGNMENT: page 20
- STRATEGIC MARKETING: page 22

In the SurveyMonkey application, you will be automatically directed to the appropriate page.

After completing the appropriate PROJECT DETAILS section in this document, please skip to NEXT STEPS on the final page (page 23).

General Note: As you work in the Word document version, please note page numbers will shift as you enter in text and responses.

PROJECT DETAILS – DECISION SUPPORT ONLY

As nonprofit leaders navigate the ongoing impact of COVID-19, many will need to make significant decisions and trade-offs over the next 12 months. Our new Decision Support Projects are designed to provide flexible consulting support to nonprofit leaders as they address challenges created by the crisis and focus on recovery and rebuilding. Whereas our other project options provide deep analysis and recommendations in one focus area (Service Line), Decision Support Projects can address priorities in several different areas. A Compass team can 1) generate data, analyze information, and create frameworks to support decision-making, 2) evaluate the consequences of course adjustments, 3) establish a communications plan around decisions made, and finally 4) help nonprofits plan for recovery, rebuilding, and ultimately greater sustainability.

32. What are the biggest concerns that you and your board have about the impact of the COVID-19 crisis on your organization?
33. To the best of your knowledge at this point, please identify the three to four highest priority areas where you may need to make decisions over the next 12 months:
- Program Adjustments
 - Staffing and Management
 - Finances
 - Fundraising
 - Events
 - Marketing and Communications
 - Operations
 - Collaborations or Mergers
 - Other (please specify):
34. Please prioritize the activities or needs you indicated above in Question 33.
- First Priority:
- Second Priority:
- Third Priority:
- Fourth Priority:
35. To the best of your knowledge at this point, what activities do you envision your Compass team conducting to achieve the objectives of your proposed project? (Please check any that seem appropriate and/or add others)
- Cash Flow Analysis: Evaluate cash inflows and outflows over a fixed period
 - Financial Model Creation: Forecast for revenues and expenses for a fixed period, based on a revised assessment of finances impacted by recent events
 - Current Donor Analysis: Identify most loyal and valuable donors for outreach, based on historical giving trends

- Donor/Member/Patron Experience and Stewardship: Design process for tracking and monitoring donor engagement, interaction, and activities to deepen relationship
- Crisis Communications: Develop resources, templates, documents, etc. for use on all media platforms
- Merger Assessment: Explore options and identify the pros and cons of merging with another nonprofit, now or in the future, or options for saving valuable programs and staff positions; Develop criteria for potential merger partner
- Programs Assessment: Evaluate feasibility of existing programs for the short-term and long-term, cash flow required to support programs, virtual options, suspension, collaborations with other nonprofits or organizations
- Digital Assessment: Explore existing or new services that could be offered using digital technologies
- Staffing: Evaluate staffing needs and options; plan for future needs
- Board Engagement: Improve effectiveness and engagement to sustain a high-performing Board; identify gaps and develop improved recruiting and on-boarding processes
- Other (please specify):

Thank you for completing this section for DECISION SUPPORT projects. Please proceed to the final page (page 23) for NEXT STEPS. Note: You will be automatically directed to do so in SurveyMonkey.

PROJECT DETAILS – BOARD DEVELOPMENT ONLY

The goal of a Board Development project is to improve effectiveness and engagement to sustain a high-performing Board. Compass can provide an objective evaluation of Board operations and offer recommendations for best practices to build a solid foundation of governance, recruitment, training and committee structures. Compass can help the Board develop an appropriate style given its current membership and organizational needs, and offer guidance regarding leadership succession planning and strategies for involving the Board in development efforts.

32. What are your objectives for this project and why is this a priority for your Board and organization?

33. What activities do you envision your Compass team conducting to achieve the objectives of your proposed project? (Please check any that seem appropriate and/or add others)

- Survey and/or interview the Board of Directors
- Survey and/or interview key staff and relevant external stakeholders
- Review the Board's structure, roles and responsibilities, processes and goal setting
- Review Board committee roles and responsibilities
- Review by-laws and Board policies
- Survey and/or research comparable organizations to identify the best practices in performance evaluation and measurement
- Research and develop performance metrics and/or dashboards for Board use
- Other (please specify):

34. Do you have a specific "end product" in mind?

35. One to two years after the Compass project concludes, what would you like to have achieved, or what capabilities would you like to possess? (Please check any that seem appropriate and/or add others)

- Increased Board size
- Increased Board engagement
- Improved Board diversity (may include skills, age, ethnicity, experience, etc.)
- Increased Board financial contributions
- Improved Board fundraising capacity
- Established Board committees, revised bylaws, and clarified roles and responsibilities
- Transitioned from one type of Board to another (e.g. advisory to fundraising)
- Implemented evaluation or assessment tools for organizational leadership
- Other (please specify):

Thank you for completing this section for BOARD DEVELOPMENT projects. Please proceed to the final page (page 23) for NEXT STEPS. You will be automatically directed to do so in SurveyMonkey.

PROJECT DETAILS – FUNDING STRATEGY *ONLY*

Funding Strategy projects assess revenue sources and revenue generation methods and can provide guidance to broaden or deepen current sources of revenue, recommend untapped sources for funding and screen out less promising avenues. Compass can also evaluate earned income ideas and offer recommendations to improve external communications.

32. What are your objectives for this project and why is this a priority for your organization?
33. What activities do you envision your Compass team conducting to achieve the objectives of your proposed project? (Please check any that seem appropriate and/or add others)
- Survey and/or interview the Board of Directors
 - Survey and/or interview key staff and relevant external stakeholders
 - Analyze funding sources and uses
 - Analyze donor data
 - Evaluate donor cultivation, tracking, and stewardship processes
 - Interview/survey and/or hold focus groups with current or prospective donors
 - Investigate how comparable organizations raise funds
 - Analyze the cost effectiveness of various fundraising strategies
 - Research investment required to generate new funding source
 - Investigate benefits most attractive to specific donor demographics
 - Evaluate a proposed earned income venture
 - Evaluate an existing earned income program
 - Other (please specify):
34. Do you have a specific "end product" in mind?
35. One to two years after the Compass project concludes, what would you like to have achieved, or what capabilities would you like to possess? (Please check any that seem appropriate and/or add others)
- Additional fundraising or development capacity
 - Diversified revenue streams
 - Established or increased earned income revenue
 - Increased corporate revenue
 - Increased foundation revenue
 - Increased individual donor engagement and giving
 - Increased membership income
 - Utilization of assessment tool to analyze opportunities
 - Increased Board fundraising participation

- Established or increased endowment
- Other (please specify):

Thank you for completing this section for FUNDING STRATEGY projects. Please proceed to the final page (page 23) for NEXT STEPS. You will be automatically directed to do so in SurveyMonkey.

PROJECT DETAILS – PARTNERSHIPS, COLLABORATIONS & MERGERS ONLY

To make more efficient use of resources, nonprofits may consider partnering with other organizations with complementary expertise and strengths to fulfill a common mission. Compass can help assess the value and appropriateness of strategic partnerships, collaborations, or mergers and offer recommendations and an analysis of resulting implications.

32. What are your objectives for this project and why is this a priority for your organization?
33. What activities do you envision your Compass team conducting to achieve the objectives of your proposed project? (Please check any that seem appropriate and/or add others)
- Survey and/or interview the Board of Directors
 - Survey and/or interview key staff and relevant external stakeholders
 - Survey and/or interview potential partners
 - Identify and evaluate prospective partner(s) or collaborations
 - Evaluate an existing partnership/collaboration
 - Identify and evaluate peer organization partnerships/collaborations
 - Create a tool to evaluate existing/future partners
 - Identify and consider criteria to explore a potential merger
 - Identify and evaluate prospective organizations with which to merge
 - Other (please specify):
34. Do you have a specific "end product" in mind?
35. One to two years after the Compass project concludes, what would you like to have achieved, or what capabilities would you like to possess? (Please check any that seem appropriate and/or add others)
- Established new partnerships and/or collaborations
 - Utilization of evaluation parameters for consideration of future potential partnerships and collaborations
 - Addition of new programs
 - Provision of services to a greater number of people
 - Programs better aligned with current or new partners
 - Provision of additional services with shared resources
 - Other (please specify):

Thank you for completing this section for PARTNERSHIPS, COLLABORATIONS AND MERGERS projects. Please proceed to the final page (page 23) for NEXT STEPS. You will be automatically directed to do so in SurveyMonkey.

PROJECT DETAILS – STRATEGIC ALIGNMENT *ONLY*

Compass can help nonprofits examine their mission, vision, programs, targeted beneficiaries, desired changes, strategic objectives and supporting activities to understand how to achieve the greatest impact. Strategic Alignment projects can examine the allocation of financial and staff resources across programs with regard to organizational priorities and can also help evaluate opportunities for service or program development. These projects can also help ensure that the Board and organization leadership are aligned around mission, vision, and key choices in preparation for strategic planning and/or long-term goal setting. The exact focus of individual projects varies depending on a nonprofit's needs and situation with tailored recommendations to improve the organization's strategic alignment and potential for success.

32. What are your objectives for this project and why is this a priority for your organization?
33. What activities do you envision your Compass team conducting to achieve the objectives of your proposed project? (Please check any that seem appropriate and/or add others)
- Survey and/or interview the Board of Directors
 - Survey and/or interview key staff and relevant external stakeholders
 - Evaluate the alignment of programs and resources in accordance with mission
 - Evaluate and review mission, vision, and/or values
 - Assess the return on programs and related resources
 - Identify measures and key performance indicators for programs and outcomes
 - Create a tool to evaluate current and/or new programs
 - Other (please specify):
34. Do you have a specific "end product" in mind?
35. One to two years after the Compass project concludes, what would you like to have achieved, or what capabilities would you like to possess? (Please check any that seem appropriate and/or add others)
- Implementation of new organizational chart
 - Ability to evaluate the alignment of programs and resources
 - New or revised strategic plan
 - Ability to assess the return on programs and resources
 - Ability to identify measures and key performance indicators for programs and outcomes
 - Eliminated program(s)
 - Allocated greater resources to identified strategic initiatives
 - Increase in individuals served
 - Resources applied more efficiently

Other (please specify):

Thank you for completing this section for STRATEGIC ALIGNMENT projects. Please proceed to the final page (page 23) for NEXT STEPS. You will be automatically directed to do so in SurveyMonkey.

PROJECT DETAILS – STRATEGIC MARKETING ONLY

To help fulfill its mission and vision, Compass can help nonprofits identify opportunities for services and programs in existing and new markets. Compass can help create a positioning statement and develop an effective marketing strategy to take advantage of new opportunities. The project does not include collateral development.

32. What are your objectives for this project and why is this a priority for your organization?
33. What activities do you envision your Compass team conducting to achieve the objectives of your proposed project? (Please check any that seem appropriate and/or add others)
- Survey and/or interview the Board of Directors
 - Survey and/or interview key staff and relevant external stakeholders
 - Interview/survey and/or hold focus groups with current or prospective audiences or populations
 - Evaluate existing marketing strategy and tactics
 - Identify new target audiences for current products or services
 - Devise marketing strategy and tactics for new products or services
 - Research comparable organizations and differentiation
 - Review and evaluate new/existing social media plans
 - Evaluate positioning statements or value propositions
 - Identify opportunities to improve engagement and awareness
 - Other (please specify):
34. Do you have a specific "end product" in mind?
35. One to two years after the Compass project concludes, what would you like to have achieved, or what capabilities would you like to possess? (Please check any that seem appropriate and/or add others)
- Established new services in existing or new markets
 - New or revised positioning statement or value proposition, providing differentiation from peers
 - Increased or expanded reach to a target audience or population
 - Improved engagement and awareness with a target population or community stakeholders
 - Other (please specify):

Thank you for completing this section for STRATEGIC MARKETING projects. Please proceed to the final page (page 23) for NEXT STEPS. You will be automatically directed to do so in SurveyMonkey.

NEXT STEPS

36. Please confirm the Executive Director has read this application.

- Yes
- If No, please explain:

37. Please confirm the Board Chair has read this application.

- Yes
- If No, please explain:

SUPPORTING MATERIAL

Once you have copied and pasted your responses into [Survey Monkey](#) and have submitted the application, to help the Client Selection Committee understand your organization better, please email Megan Tomey (mtomey@compassphilly.org) electronic copies of the following items as soon as possible as applications will be reviewed on a rolling basis:

1. A list of board members and their professional affiliations (required)
2. A copy of your most recent audited financials (required)
3. Any additional supporting material about your organization such as annual reports, brochures, strategic plans, news articles, etc. you would like to share (optional)

INTERVIEWS

As soon as we have your application and supporting materials, a member of the Client Selection Committee will contact your organization's Executive Director and Board Chair to schedule an interview.

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

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

Anne Randig Andres
Program Manager
aandres@compassphilly.org
(610) 986-6247

Megan Tomey
Assistant Program Manager
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