



## **On Demand Consulting**

On Demand Projects address a single issue with projects for up to eight weeks. Compass connects nonprofits to a business professional with the expertise to quickly understand and address an immediate challenge with tailored recommendations. A volunteer may invite another consultant to support the project, but most nonprofits are matched with individuals. Volunteer consultants are not expected to support implementation, although many do continue to work with their client in a personal capacity after an engagement concludes.

## **Thought Partners**

Compass connects seasoned business professionals with nonprofit leaders facing urgent decisions regarding programming, finances, strategy, governance, and more. In a confidential setting, Thought Partners provide a trusted ear for scenario planning, courses of action, and may also facilitate difficult conversations among board, staff, and leadership. Depending on a client's needs, a Thought Partner may offer several informal calls over eight weeks, or schedule formal check-ins with an agenda, reading materials, etc.

## **Project Descriptions**

- I. **Finance**
  - A. **Cash Flow Analysis:** Evaluation of cash inflows and outflows over a fixed period
  - B. **Financial Model Creation:** Forecast for revenues and expenses for a fixed period, based on a revised assessment of finances
- II. **Fundraising**
  - A. **Donor Analysis:** Support for identifying most loyal and valuable donors for outreach, using historical data and trends
  - B. **Digital Strategy Review:** Receive recommendations related to donation engagement online and related processes
  - C. **Map the Donor/Member/Patron Experience:** An audit of donor, member, or patron journey, and provide recommendations to improve interaction across platforms
  - D. **Research:** An annotated list of relevant grant and funding opportunities
- III. **Marketing/Communications**
  - A. **Communications Audit/Strategy Review:** A review and/or refinement messages for existing communications platforms
  - B. **Marketing Strategy Review:** A review with provide recommendations for plan, program, or event; may include comparative analysis, market research, stakeholder analysis, etc.
- IV. **Technology**
  - A. **Scouting:** Support to identify requirements for new technology or tools; develop an acquisition and adoption strategy
- V. **Programs**
  - A. **Programs Assessment:** Assessment of feasibility of existing programs, may include review of cash flow required to support programs, virtual options, suspension, and partnerships
  - B. **Partner Identification/Merger Assessment:** A review of the risks and benefits of a merger or partnerships, may include development of selection criteria,



a feasibility review of existing programs, cash flow required to support programs, virtual options, suspension, etc.

- C. **Virtual Transition:** Recommendations to support the transition of in-person programs, event, or fundraiser; may include technology, capacity, and stakeholder assessment
- VI. **Human Resources**
- A. **Diversity, Equity, and Inclusion (DEI):** An assessment of existing DEI efforts for updates; develop plan for staff or Board recruitment and retention
  - B. **Staffing:** An evaluation of staffing needs and options, may include HR policies
  - C. **Transition/Succession:** Development of a plan for continuity of operations for the planned or unexpected absence of staff and management
  - D. **Benefits and Compensation:** A review with recommendations for new or existing policies
- VII. **Governance**
- A. **Board Development:** A review of governance challenges, such as the articulation of the roles/responsibilities and appropriate activities of a nonprofit board
  - B. **Bylaws and Policies:** A review, with proposed recommendations for bylaws or policies regarding board operations, may include liabilities
  - C. **Nonprofit Status & Registration:** A review of status, or reporting requirements, with recommendations
  - D. **Contracts & Liabilities:** A review of contracts, waivers, liability documents, etc. with recommendations
  - E. **Intellectual Property:** A review of copyright and trademark registration process (e.g. educational materials, logos, etc.)