



## **2021-2022 COMPASS CLASSIC CLIENT APPLICATION CHICAGO**

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: Monday, June 7, 2021 at 5:00pm CT**

### **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 Chicago.
- Mission does not promote specific religious beliefs or political party/movement.
- Minimum of three full-time staff.
- Active Board of Directors.

### **INTRODUCTION**

Compass grants pro bono consulting services to nonprofits that benefit the Greater Chicago community. Each nonprofit client receives up to \$250,000 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 considers many factors including service line diversity, racial diversity of leadership & population served, and representation of a 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:** 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 early October, and teams are formed, trained, and begin working in late October. Projects are completed no later than May 31, 2022.

### **APPLICATION INSTRUCTIONS & SUPPORT**

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

- PDF 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 (Current 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 Melissa Lapica ([mlapica@compasschicago.org](mailto:mlapica@compasschicago.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!

Natalie Tessler  
Executive Director  
[ntessler@compaschicago.org](mailto:ntessler@compaschicago.org)  
(773) 848-1706

Melissa Lapica  
Program Manager  
[mlapica@compasschicago.org](mailto:mlapica@compasschicago.org)  
(201) 838-7510

## APPLICANT INFORMATION

1. Organization Name:
2. Contact Information
  - Street Address:
  - Street Address (cont.):
  - City:
  - State:
  - Zip:
  - County:
  - Phone:
  - Website:
3. Person Completing Application
  - Title (Mr., Ms., Dr., etc.):
  - Full Name:
  - Job Title:
  - Phone:
  - Email:
4. Executive Director Contact Information
  - Title (Mr., Ms., Dr., etc.):
  - Full Name:
  - Job Title (ED, CEO, President, etc.):
  - Phone:
  - 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 2022?
  - Yes
  - If No or Unsure, please explain:
7. Please provide a short biography of your organization's Executive Director. (100 words)
8. How does the Executive Director publicly self-identify? (Check all that apply):
  - American Indian or Alaska Native
  - Asian or Asia American
  - Black or African American
  - Latinx or Hispanic
  - Middle Eastern or Northern African

- Native Hawaiian or Other Pacific Islander
- White
- Prefer not to say

9. Current Board Chair Contact Information

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

Full Name:

Home Address:

Home Address (cont.):

Home City:

Home State:

Home Zip:

Phone:

Email:

Company:

Title at Company:

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

11. If your Board Chair's term will expire between June 2021 and June 2022, when will the transition occur? (Approximate month/year)

12. If the Board Chair's term will expire between June 2021 and June 2022, 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:

Home State:

Home Zip:

Phone:

Email:

Company:

Title at Company:

13. If your Board Chair's term will expire between June 2021 and June 2022, does the incoming Board Chair support the Compass project?

- Yes
- Not Applicable
- If No or unsure, please explain:

14. What percentage of your organization's Board of Directors is Black, Indigenous, or People of Color?

15. 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**

16. 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 Melissa Lapica, 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 Chicago.		
Our mission does not promote specific religious beliefs or political party/movement.		
We have at least three full-time staff members.		
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 facilitate the project within the organization, engaging the board and staff.		
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 September 2021.		
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

17. What is your organization's mission statement?

18. 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"/> Immigration and Refugees |
| <input type="checkbox"/> Economic Development   | <input type="checkbox"/> LGBTQ+                   |
| <input type="checkbox"/> Education  | <input type="checkbox"/> Racial Equity            |
| <input type="checkbox"/> Environment  | <input type="checkbox"/> Senior Services          |
| <input type="checkbox"/> Financial Literacy / Entrepreneurship / Economic Empowerment | <input type="checkbox"/> Social Justice           |
|   | <input type="checkbox"/> Veteran Services         |
|   | <input type="checkbox"/> Workforce Development    |
|   | <input type="checkbox"/> Other (please specify)   |

19. 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"/> Immigration and Refugees |
| <input type="checkbox"/> Economic Development   | <input type="checkbox"/> LGBTQ+                   |
| <input type="checkbox"/> Education  | <input type="checkbox"/> Racial Equity            |
| <input type="checkbox"/> Environment  | <input type="checkbox"/> Senior Services          |
| <input type="checkbox"/> Financial Literacy / Entrepreneurship / Economic Empowerment | <input type="checkbox"/> Social Justice           |
|   | <input type="checkbox"/> Veteran Services         |
|   | <input type="checkbox"/> Workforce Development    |
|   | <input type="checkbox"/> Other (please specify)   |

20. Approximately how many beneficiaries do you serve each year?

21. Approximately what percentage of the people you serve are: (Please note that percentages may not add up to 100% as categories will likely overlap)

American Indian or Alaska Native:

Asian or Asian American:

Black or African American:

Latinx or Hispanic:  
Middle Eastern or Northern African:  
Native Hawaiian or Other Pacific Islander:  
White:  
Low-moderate income:

22. In what neighborhoods do you provide services?
23. Please list and briefly describe the primary programs/services offered by your organization. (Please use bullet points, 200 words)
24. How do you measure the impact of your programs/services? (150 words)



## ORGANIZATIONAL AND FINANCIAL DETAILS

25. What year did your organization receive its 501(c)(3) IRS tax determination status?

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

27. How many paid, part-time staff do you employ?

28. Does your organization have a Development Director?

Yes

No

Other (please specify):

29. How many board members do you currently have?

30. 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?*

31. Approximately what percentage of board members contributed to your organization last year?

32. Does your organization follow a written strategic plan?

Yes

No

*If yes, when was it developed and what time frame does it cover? (50 words)*

33. If applicable, what are the major elements of your organization's strategy or Strategic Plan? (100 words)

34. How has the past year impacted your organization? Explain how your organization has adapted and evolved over the last year.

35. 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:

36. Please indicate if you currently receive funding from the following foundations.

- Abra Prentice Foundation
- Brinson Foundation
- The Chicago Community Trust
- Chicago Foundation for Women
- The Circle of Service Foundation
- CME Foundation
- Crown Family Philanthropies
- The Field Foundation of Illinois
- Harvey L Miller Supporting Foundation
- Helen Brach Foundation
- Jewish Federation of Chicago
- The Joyce Foundation
- The Lloyd A. Fry Foundation
- The John D. and Catherine T. MacArthur Foundation
- The Robert R. McCormick Foundation
- Northern Trust Foundation
- The Pierce Family Charitable Foundation
- The Polk Bros. Foundation
- The Prince Charitable Trust
- The Siragusa Family Foundation
- Other:

37. Please outline any major activities or events your organization will engage in between September 2021 and May 2022 (e.g., acquisitions/partnerships, milestone anniversary, accreditations, litigation, executive searches, relocation, etc.).

38. If selected as a Compass client, do you anticipate using other consultants (paid or pro bono) during 2021-22? If yes, please elaborate. Please note that Compass does not conduct projects with organizations that anticipate using other *strategy or management* consultants during the Compass project period.

## PROJECT CHOICE

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

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 Melissa Lapica, 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.**

### **39. Project Choice (Please select one project type)**

**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 can assess revenue sources and revenue generation methods and provide guidance to broaden or deepen current sources of revenue, identify untapped sources for funding, and screen out less promising avenues. In addition, they may offer recommendations to improve fundraising processes and external communications, and determine organizational support required. Alternatively, Compass Funding Strategy projects can research and evaluate existing or new earned income ventures and support the creation of business plans.

**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.

**Digital Strategy**

Compass can help nonprofits understand how to design and implement existing or new services that could only be offered using digital technologies. Project objectives include understanding how to use digital technologies to better serve the organization's objectives overall or within a specific service area. These projects will help define the new service process, identify candidate enabling digital technologies, and provide a high-level plan to implement the new digital service(s) (including key activities, investment and staffing).

**Please indicate your second choice for Service Line, if applicable:**

## **IMPORTANT NOTE – PLEASE READ**

**BASED ON YOUR RESPONSE FOR QUESTION 39, PLEASE ONLY FILL OUT THE SECTION CORRESPONDING WITH THE SERVICE LINE OF CHOICE**

**Please proceed to the following pages depending on Service Line:**

- BOARD DEVELOPMENT: page 14
- FUNDING STRATEGY: page 16
- PARTNERSHIPS, COLLABORATIONS AND MERGERS: page 18
- STRATEGIC ALIGNMENT: page 20
- STRATEGIC MARKETING: page 22
- DIGITAL STRATEGY: page 24

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 26).**

*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 – BOARD DEVELOPMENT (ONLY FILL OUT IF THIS IS YOUR FIRST CHOICE)**

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.

40. What are your objectives for this project and why is this a priority for your Board and organization?
41. 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):
42. What do you hope to receive from the consulting team by the end of the project? (e.g., recommendations, deliverables, retreat)
43. 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 26) for NEXT STEPS. You will be automatically directed to do so in SurveyMonkey.***

**PROJECT DETAILS – FUNDING STRATEGY *(ONLY FILL OUT IF THIS IS YOUR FIRST CHOICE)***

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.

40. What are your objectives for this project and why is this a priority for your organization?
41. 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):
42. What do you hope to receive from the consulting team by the end of the project? (e.g., recommendations, deliverables, retreat)
43. 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 26) for NEXT STEPS. You will be automatically directed to do so in SurveyMonkey.***

**PROJECT DETAILS – PARTNERSHIPS, COLLABORATIONS & MERGERS (ONLY FILL OUT IF THIS IS YOUR FIRST CHOICE)**

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.

40. What are your objectives for this project and why is this a priority for your organization?
41. 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):
42. What do you hope to receive from the consulting team by the end of the project? (e.g., recommendations, deliverables, retreat)
43. 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 26) for NEXT STEPS. You will be automatically directed to do so in SurveyMonkey.***

**PROJECT DETAILS – STRATEGIC ALIGNMENT *(ONLY FILL OUT IF THIS IS YOUR FIRST CHOICE)***

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.

40. What are your objectives for this project and why is this a priority for your organization?
41. 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):
42. What do you hope to receive from the consulting team by the end of the project? (e.g., recommendations, deliverables, retreat)
43. 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 26) for NEXT STEPS. You will be automatically directed to do so in SurveyMonkey.***

**PROJECT DETAILS – STRATEGIC MARKETING *(ONLY FILL OUT IF THIS IS YOUR FIRST CHOICE)***

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.

40. What are your objectives for this project and why is this a priority for your organization?
41. 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):
42. What do you hope to receive from the consulting team by the end of the project? (e.g., recommendations, deliverables, retreat)
43. 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 26) for NEXT STEPS. You will be automatically directed to do so in SurveyMonkey.***

**PROJECT DETAILS – DIGITAL STRATEGY *(ONLY FILL OUT IF THIS IS YOUR FIRST CHOICE)***

Compass can help nonprofits understand how to design and implement existing or new services that could only be offered using digital technologies. Project objectives include understanding how to use digital technologies to better serve the organization’s objectives overall or within a specific service area. These projects will help define the new service process, identify candidate enabling digital technologies, and provide a high-level plan to implement the new digital service(s) (including key activities, investment and staffing).

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 key staff and relevant external stakeholders
  - Survey peer organizations to search for best practices, technology insights and potential models to emulate
  - Review the organization’s website (e.g., objectives, structure, strengths, limitations, technological management, usability)
  - Assess existing technology capabilities throughout organization
  - Evaluate the organization’s data capture and management methodologies
  - Assess how data collection processes, tools, and analysis can better support decision-making
  - Assess and evaluate strategies for more effective use of existing technology to support the organization’s strategic goals or to improve efficiency, effectiveness and internal collaboration
  - Determine opportunities to use new or different technology to support the organization’s strategic goals or to improve efficiency, effectiveness and internal collaboration
  - Assess a program area or key function (e.g., finance, development, etc.) and evaluate options that could improve efficiency, effectiveness and/or reduce costs
  - Explore existing or new services that could be offered using digital technologies
  - Other (please specify)
34. What existing services or new services do you envision creating that can only be offered by leveraging digital technologies?
35. Describe how this service will further your mission in 1-2 years.



***Thank you for completing this section for DIGITAL STRATEGY projects. Please proceed to the final page (page 26) for NEXT STEPS. You will be automatically directed to do so in SurveyMonkey.***

## NEXT STEPS

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

- Yes
- If No, please explain:

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

- Yes
- If No, please explain:

## SUPPORTING MATERIAL

Once your application has been submitted, to help the Client Selection Committee understand your organization better, please email Melissa Lapica ([mlapica@compasschicago.org](mailto:mlapica@compasschicago.org)) electronic copies of the following items as soon as possible but no later than Friday, June 11.

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

A member of the Client Selection Committee will contact your organization's Executive Director and Board Chair to schedule an interview.

Thank you very much for submitting a client application. Your application is not submitted until you click "Submit" below, at which point you will receive a confirmation screen. Please contact us with any questions. Thank you again for your interest in Compass.

Natalie Tessler  
Executive Director  
(773) 848-1706  
[ntessler@compasschicago.org](mailto:ntessler@compasschicago.org)

Melissa Lapica  
Program Manager  
(201) 838-7510  
[mlapica@compasschicago.org](mailto:mlapica@compasschicago.org)