



## 2022-2023 COMPASS MICRO 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, November 18, 2022 at 5:00 p.m.**

### **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 (PA), Montgomery (PA), Chester (PA), Delaware (PA), Bucks (PA), Burlington (NJ), Camden (NJ), and/or Gloucester (NJ).
- Mission does not promote specific religious beliefs or political party/movement.

### **INTRODUCTION**

Compass grants pro bono consulting services to nonprofits that benefit the Greater Philadelphia community. Last year, nonprofit Micro Project clients received on average \$65,000 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 that 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. Compass will announce final client selections in mid-December. Project Leaders and team members will be recruited, formed, and trained in February and teams will begin working by March. Projects are completed by June 2023.

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

### **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 do so in one sitting to avoid potential technical issues in accessing the application.**

Please contact Samantha Campbell ([scampbell@compassphilly.org](mailto:scampbell@compassphilly.org)) with any technical problems or questions.

### **THANK YOU**

Thank you again for your interest in Compass. Please do not hesitate to reach out to us with any questions.

Melinda Johnson, EdD  
Executive Director  
[mjohnson@compassphilly.org](mailto:mjohnson@compassphilly.org)  
(215) 398-7942

Megan Tomey  
Program Manager  
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Samantha Campbell  
Associate Program Manager  
[scampbell@compassphilly.org](mailto:scampbell@compassphilly.org)  
(301) 401-1107

## APPLICANT INFORMATION

1. Organization Name:
  
2. Contact Information
  - Street Address:
  - Street Address (cont.):
  - City:
  - State:
  - Zip:
  - County:
  - Phone (ex: 555-555-5555):
  - Website:
  - LinkedIn:
  - Facebook:
  - Twitter:
  
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 2023?
  - Yes
  - If No or Unsure, please explain:
  
7. How does the Executive Director publicly self-identify? (Check all that apply):
  - 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
- Prefer not to say

8. Current Board Chair Contact Information

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

Full Name:

Home Address:

Home Address (cont.):

Home City:

Home State:

Home 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/their term end?

10. If your Board Chair's term will expire between November 2022 and June 2023, 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 November 2022 and June 2023, when will the transition occur? (Approximate month/year)

12. If the Board Chair's term will expire between November 2022 and June 2023, and the incoming Board Chair has been chosen, please provide his/her/their name and contact information.

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

Full Name:

Home Address:

Home Address (cont.):

Home City

Home State

Home Zip:

Phone (ex: 555-555-5555):

Email:

Company:

Title at Company:

13. What percentage of your organization's board is Black, Indigenous, or People of Color?

14. 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**

15. 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 Megan Tomey, 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 (PA), Montgomery (PA), Chester (PA), Delaware (PA), Bucks (PA), Camden (NJ), Burlington (NJ), and/or Gloucester (NJ).		
Our mission does not promote specific religious beliefs or political party/movement.		
We have a Board of Directors.		
We will provide documents to the Compass team (e.g., financial statements, strategic plans).		
The Executive Director and Board Chair (if available) will participate in an interview with a Compass representative in late-November / early-December.		
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 at 9:30 a.m. on February 10, 2023		
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

16. What is your organization's mission statement?

17. What is the primary issue area in which your organization works? (Please select one)

- |  |   |
|--|---|
| <input type="checkbox"/> Animal Welfare                          | <input type="checkbox"/> Health Care                            |
| <input type="checkbox"/> Anti-violence / Violence Interruption   | <input type="checkbox"/> Housing and Homelessness               |
| <input type="checkbox"/> Arts and Culture                        | <input type="checkbox"/> Human Services                         |
| <input type="checkbox"/> Children and Youth                      | <input type="checkbox"/> Immigration and Refugees               |
| <input type="checkbox"/> Disability Services                     | <input type="checkbox"/> LGBTQ+                                 |
| <input type="checkbox"/> Economic Development                    | <input type="checkbox"/> Nonprofit Services / Capacity Building |
| <input type="checkbox"/> Education                               | <input type="checkbox"/> Racial Equity                          |
| <input type="checkbox"/> Entrepreneurship / Economic Empowerment | <input type="checkbox"/> Senior Services                        |
| <input type="checkbox"/> Environment                             | <input type="checkbox"/> Social Justice                         |
| <input type="checkbox"/> Financial Literacy                      | <input type="checkbox"/> Veteran Services                       |
| <input type="checkbox"/> Food Security                           | <input type="checkbox"/> Workforce Development                  |
| <input type="checkbox"/> Gender Equity                           | <input type="checkbox"/> Other (please specify)                 |

18. What are the secondary issue areas in which your organization works? (Check all that apply)

- |  |   |
|--|---|
| <input type="checkbox"/> Animal Welfare                          | <input type="checkbox"/> Health Care                            |
| <input type="checkbox"/> Anti-violence / Violence Interruption   | <input type="checkbox"/> Housing and Homelessness               |
| <input type="checkbox"/> Arts and Culture                        | <input type="checkbox"/> Human Services                         |
| <input type="checkbox"/> Children and Youth                      | <input type="checkbox"/> Immigration and Refugees               |
| <input type="checkbox"/> Disability Services                     | <input type="checkbox"/> LGBTQ+                                 |
| <input type="checkbox"/> Economic Development                    | <input type="checkbox"/> Nonprofit Services / Capacity Building |
| <input type="checkbox"/> Education                               | <input type="checkbox"/> Racial Equity                          |
| <input type="checkbox"/> Entrepreneurship / Economic Empowerment | <input type="checkbox"/> Senior Services                        |
| <input type="checkbox"/> Environment                             | <input type="checkbox"/> Social Justice                         |
| <input type="checkbox"/> Financial Literacy                      | <input type="checkbox"/> Veteran Services                       |
| <input type="checkbox"/> Food Security                           | <input type="checkbox"/> Workforce Development                  |
| <input type="checkbox"/> Gender Equity                           | <input type="checkbox"/> Other (please specify)                 |

19. Please quantify the number of beneficiaries each year.

20. 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:

21. Approximately what percentage of the people you serve are:  
Low income:  
Low-moderate income:
22. In what counties or 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. How many board members do you currently have?

29. How has your organization adapted and evolved over the last year?

30. Please provide the following financial information for two 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:

*Please provide any additional information about how recent events may be affecting your budget:*

31. Please indicate if you receive funding or other support from any of the following:

- Comcast
- Connelly Foundation
- The Foundation for Delaware County
- Dolfinger-McMahon Foundation
- The Patricia Kind Family Foundation
- Christian R. & Mary F. Lindback Foundation
- MKM Foundation
- The Neubauer Family Foundation
- Philadelphia Eagles
- The Philadelphia Foundation

32. Please outline any major activities or events your organization will engage in between February and June 2023 (e.g., acquisitions/partnerships, milestone anniversary, accreditations, litigation, executive searches, relocation, etc.).

33. If selected as a Compass client, do you anticipate using other consultants (paid or pro bono) during 2023?

Please note that Compass does not conduct projects with organizations that anticipate using other *strategy or management* consultants during the Compass project period.

- Yes

No

*If yes, please elaborate.*

## PROJECT CHOICE

Compass offers consulting projects within the following service lines for Micro Project clients: Board Development, Funding Strategy, New Ventures, Strategic Alignment, Strategic Marketing, and Technology Strategy. Please choose ONLY ONE service line, then choose ONE project within the service line.

The projects offered here are associated with the preliminary data collection stage of a traditional Compass project. They consist of stakeholder interviews, focus groups, client surveys, literature searches, subject matter expert interviews, interviews of 'leaders in the field' for best practices, and analysis of specific data either collected or already in house. The deliverable will typically be the results of analysis of this preliminary data with 'next step' recommendations. Please see descriptions for all project options below.

Please check ONLY ONE service line and ONLY ONE project below. Then, in the following pages, be as specific as possible in describing the project scope and objectives.

34. Please select one service line.

- Board Development *(only complete question 35 in this section)*
- Funding Strategy *(only complete question 36 in this section)*
- New Ventures *(only complete question 37 in this section)*
- Strategic Alignment *(only complete question 38 in this section)*
- Strategic Marketing *(only complete question 39 in this section)*
- Technology Strategy *(only complete question 40 in this section)*

35. For BOARD DEVELOPMENT, please select ONLY ONE project from the choices below.

- BOARD GAP ANALYSIS AND PERFORMANCE ASSESSMENT: Survey and interview the board of directors to identify gaps in skills, industry expertise, board expertise, satisfaction with board performance, and opportunities for improvement.
- BOARD STRUCTURE AND ORGANIZATION: Review the board's organization, structure, roles and responsibilities, accountabilities, processes, and goal setting. Review by-laws and board's policies and procedures. Make recommendations for further development.
- ORGANIZATIONAL PERFORMANCE EVALUATION AND GOAL SETTING: Help the board with annual goal setting for the organization as a whole, for programs and processes, and for key staff, including performance evaluation processes. Review/update the position descriptions of the ED and senior staff as needed.
- DASHBOARDS/PERFORMANCE METRICS/BEST PRACTICES: Survey comparable organizations and available literature to identify the best practices in performance evaluation and measurement. Help the nonprofit develop

performance metrics, at a high level, that are appropriate to its needs and consistent with best practices.

36. For FUNDING STRATEGY, please select ONLY ONE project from the choices below.

- FUNDING SOURCES AND USES ANALYSIS: Are you overly dependent on any particular source of funds? What opportunities exist for diversification, if any? Review how comparable organizations and competitors are raising funds. What investment is required to generate a specific new funding source?
- ROI FOR VARIOUS INITIATIVES (MAILING, EVENTS, PROGRAMS): Analyze the cost effectiveness of various fundraising strategies. Does a strategy produce a positive ROI? If not, are there strategic reasons to continue? How effective are certain fundraising strategies with particular donor groups? What kind of analysis should the client be performing regularly to ensure that fundraising dollars are devoted to the best possible use?
- CONVERSION RATES FOR SMALL DONORS: Analyze the donor population. Which demographic groups or types of donors are most likely to be converted to a higher level of support? Who leaves and why?
- CULTIVATION STRATEGIES TO INCREASE DONOR CONTRIBUTIONS: Focus groups with donors. What benefits are most attractive to a specific donor population to ensure renewed subscriptions and/or increased support. Best practices used by comparable organizations. Identify which benefits are most attractive to specific donor demographics.
- BEST PRACTICES IN FUNDING STRATEGIES: Literature and Internet search for best practices, innovative approaches. Interview subject matter experts and 'best in field' organizations for new opportunities.
- BOARD ROLE: FUNDRAISING BEST PRACTICES: Define the roles and responsibilities of the Board's Development Committee, its relationship with a Director of Development and fundraising staff, shared goal setting, Give or Get requirements. Educate board members to be spokespeople for the organization.

37. For NEW VENTURES, please select and confirm the project below is your choice.

- NEW PROGRAM GROWTH OR START-UP EVALUATION: Evaluate a proposed earned income venture or a new program. The team will gather the data and conduct the analysis to assess the feasibility of a new initiative. This may include market and competitive research, financial modeling, and an examination of strategic, organizational, and operational considerations that leadership would need to make a more informed decision about moving forward.

38. For STRATEGIC ALIGNMENT, please select ONLY ONE project from the choices below.

- STAKEHOLDER INTERVIEWS: MISSION AND VISION DEVELOPMENT: Interview organizational stakeholders regarding the organization's mission and values. Perform a SWOT (strengths, weaknesses, opportunities and threats) analysis as a key input into a strategic planning process.
- CLIENT SATISFACTION SURVEY/FOCUS GROUPS: Survey the nonprofit's client population regarding satisfaction with services received and/or conduct focus groups to identify areas for program improvement or opportunities to provide additional or modified services.
- PROGRAM ROI, BUDGETING: Review sources and uses of revenues for specific programs and identify which programs are net sources of revenue and which are net users, or when a specific investment will break even. Budgeting would be involved when multiple programs or 'activities' are being run without a break-out of the costs and revenues specific to a program, including the appropriate allocation of overhead.
- BEST PRACTICES IN SPECIFIC AREA OF PROGRAM MANAGEMENT: Review identified aspect of a program with strategic considerations and examine how competitors or other comparable nonprofits engage in this aspect of program management.
- PROGRAM IMPACT: Review existing program metrics. Identify new or enhanced metrics that are most consistent with the organization's stated strategic objectives, potentially including a review of the information systems currently in use.
- PERFORMANCE EVALUATION, FEEDBACK AND DEVELOPMENT FOR STAFF: Review processes for employee position posting, hiring, orientation, setting expectations, training, providing feedback, and receiving employee input on the above. Ensure that the organization is taking appropriate steps to get the right person in the right job, ensure that they are trained and acculturated properly, and avoid non-performance issues.
- JOB DESCRIPTIONS AND GOAL SETTING/EVALUATION FOR SENIOR STAFF: Review position descriptions, organization structure, scope of responsibility, and goal setting for senior staff positions.
- PARTNERSHIP ANALYSIS: Develop a SWOT analysis of your organization and prospective partner(s). Look at risks and opportunities associated with the partnership. Assess potential costs and make a recommendation on whether to pursue a partnership.
- PARTNERSHIP OPPORTUNITIES: Identification and initial screening of potential partnership opportunities.

39. For STRATEGIC MARKETING, please select ONLY ONE project from the choices below.

- BRANDING AND POSITIONING: Evaluate and enhance Brand definition and messaging. Recommend ways to increase awareness among target populations. Review communications, public relations, and marketing content to ensure all are aligned with new brand and reinforce the mission.
- CREATING A MARKETING ROADMAP: Develop a strategic marketing roadmap for a specific program or organizational priority. Provide recommended tactics to achieve identified goal (e.g., educating clients regarding program services, reaching new audiences, increasing participants).
- MARKETING BUDGET ASSESSMENT: Establish measures that assess the ROI on current marketing and provide insight to inform the best way to utilize marketing budget.
- DIGITAL AND SOCIAL MEDIA STRATEGY: Increase or strengthen digital and social media marketing. Recommend digital strategies to build awareness and maximize engagement.

40. For TECHNOLOGY STRATEGY, please select ONLY ONE project from the choices below.

- USING DATA FOR DECISION-MAKING: Assess how data collection processes, tools, and analysis can better support decision-making in areas such as financial management and reporting, managing volunteers, clients, donors, or other internal areas. Research tools that visually show results of data collected.
- MAKING THE MOST OF EXISTING TECHNOLOGY: Assess existing technology capabilities and recommend a strategy for more effectively using existing technology to support the organization's strategic goals or to improve efficiency and effectiveness. Evaluate technology's impact on people and processes.
- ASSESSING ORGANIZATIONAL TECHNOLOGY: Analyze existing technology capabilities throughout the organization. Determine opportunities to use new or different technology to improve organizational efficiency and effectiveness. Prioritize technology options. Create a timeline for implementing new technology while taking into account the organization's goals and resources.
- NEW TECHNOLOGY SOLUTION FOR PROGRAM OR FUNCTION: Assess a program area or key function (e.g., finance, development, etc.) and provide recommendations for technology that could improve efficiency, effectiveness and/or reduce costs.

## PROJECT DETAILS

41. What is the challenge you aim to address with a Compass project?
42. What are your objectives for this project and why is this a priority for your organization?
43. Do you have a specific "end product" in mind? What materials or deliverable(s) do you hope to receive from the consulting team by/at the conclusion of the project? (e.g., recommendations, models/tools, facilitated session)
44. One to two years after your Compass project concludes, what would you like to have achieved, or what capabilities would you like to possess?  
*Consider creating a goal that is specific, measurable, and attainable based on your Service Line and activities. For example, "I plan to implement best practices with my board that will result in 100% participation in a Give/Get policy" or "I plan to use the analysis from the stakeholder interviews to develop a new mission statement."*

## NEXT STEPS

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

- Yes
- If No, please explain:

46. 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 us understand your organization better, please email Samantha Campbell ([scampbell@compassphilly.org](mailto:scampbell@compassphilly.org)) electronic copies of the following items by Tuesday, November 22, 2022:

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

We will be in touch by mid-December regarding the status of your application.

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

Melinda Johnson, EdD  
Executive Director  
[mjohnson@compassphilly.org](mailto:mjohnson@compassphilly.org)  
(215) 398-7942

Megan Tomey  
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