Compass Pro Bono

On Track 4 Nonprofit Application

For more information on the program, process, or upcoming info sessions, [visit our website](https://compassprobono.org/nonprofits/pro-bono-consulting/).

# Application Instructions

## Before You Begin the Application

### Update Your Organizational Profile (Required)

Head to the “My Organization” tab and ensure that your organization’s information is 100% complete. The information on the My Organization page is critical to our selection process, applications submitted without an updated profile are considered incomplete.

### Schedule a Project Scoping Call (Highly Encouraged)

We welcome the opportunity to discuss your organizational priorities and challenges in order to help you determine the most appropriate service line for the challenges you are facing. Applicants usually find completing their application much easier after a scoping call. To schedule a scoping call, [click here](https://compassprobono.org/nonprofits/pro-bono-consulting/#on-track-nonprofit:~:text=APPLICATION%20DATES%20%26%20CITY%20SPECIFICS). You should see an information box with city-specific details. Select your city and then click the “Schedule a scoping call” button.

### Check Program Eligibility Criteria (Required)

Please ensure that your organization meets each of our On Track eligibility requirements below. If you have any questions, please contact your city’s Program or Managing Director before proceeding with the application. Their contact information may be found alongside their booking calendar via the link above.

* Registered IRS 501(c)(3) organization
* Active Board of Directors
* Mission supports one of our metro-regions (Chicago, DC, Minneapolis-St. Paul, or Philadelphia)
* Core programs focus on delivering social justice or social services, not promoting or recruiting on behalf of a particular faith, or providing services exclusively to members of a single faith
* Core programs do not involve lobbying
* Employ at least three FTEs
* Have the capacity to support a team of up to six consultants during a 4-month engagement

### Carefully Review Service Lines

Each project is customized to address your organization’s unique challenges within one of our service lines. Please review the [service line descriptions](https://compassprobono.org/nonprofits/pro-bono-consulting/#on-track-nonprofit) before applying. We strongly recommend a scoping call to help you choose the best service line and refine project details (see above for scheduling).

## Our Selection Criteria

Compass Pro Bono looks for indications that a potential consulting engagement will be completed successfully and have lasting, meaningful impact. These indications include organizational stability, an engaged board that holds regular meetings, capacity of the Executive Director to participate in the project, an engaged Board Chair interested in the proposed project, a well-defined and realistic project scope, and a track record of community impact. When selecting the final roster of clients, Compass Pro Bono considers many factors including geographic diversity, service line diversity, racial diversity of leadership and population served, and representation of a wide range of issue areas.

**Note:** In general, Compass does not partner with organizations that are working with other paid or pro bono consultants during the same time period as the proposed Compass project. This is due to Executive Director capacity constraints and the risk of overlapping project scopes. *(This does not apply to regular staff members who are employed on a consultant basis.)*

## Application Instructions & Support

**Required questions -** Required questions are indicated by the word "Required" at the start of the question.

**Offline editing -** For your convenience we have provided this document version of the application for you to edit offline, however the final application must be submitted through our portal.

**Saving your progress -** To save your application in our portal, simply click the "Submit" button. This will save your application, and you can later continue editing by navigating to the Nonprofit Opportunities tab and clicking the "Edit my application" button in the right-hand sidebar.

**Submitting your application -** Once your application is complete and ready for our review, check the confirmation box at the end of the application in our portal and click “Submit.” This will let us know that we should review your application for completeness and manually update your application status to “Submitted”.

## We’re here to help!

For technical support, contact our program team at programs@compassprobono.org.

For eligibility, project scoping questions, and more, please contact your city’s Program or Managing Director.

# Application Questions

## Compass Criteria

**Please verify that your organization meets the following criteria:**

**(Required)** My organization is a IRS 501(c)(3) nonprofit. (Yes/No)

**(Required)** My organization has a local mission - our work benefits Greater Washington. (Yes/No)

**(Required)** Our mission does not promote specific religious beliefs or political party/movement. (Yes/No)

**(Required)** My organization has a Board of Directors. (Yes/No)

**(Required)** My organization will provide documents to the Compass Pro Bono team (e.g. financial statements, strategic plans). (Yes/No)

**(Required)** Our Executive Director and Board Chair will interview with the Client Selection Committee. (Yes/No)

**(Required)** My organization has the ability to support a team of up to six consultants. (Yes/No)

**(Required)** My organization will provide opportunities for the Compass Pro Bono team to attend Board meetings. (Yes/No)

**(Required)** My organization will allow the Compass Pro Bono team to present their final recommendations to the Board. (Yes/No)

**(Required)** Our Executive Director will attend the Client Orientation. (Yes/No)

**(Required)** Our Executive Director will complete the Mid-Project and End-of-Project Surveys. (Yes/No)

**(Required)** My organization will complete the Compass Pro Bono Impact Survey one to two years after the project concludes. (Yes/No)

**If you answered "No" to any of the above, please elaborate.**

## Organization Leadership

**(Required) Will your Executive Director stay in that role for the entirety of the project?**

Yes/No

**If your Executive Director is leaving during the project, please elaborate.**

**(Required) Will your Board Chair stay in that role for the entirety of the project?**

Yes/No

**If your Board Chair will be stepping down during the project, approximately when will that transition occur?**

**Incoming Board Chair**

**If the current Board Chair's term will expire during the project, and the incoming Board Chair has been chosen, please provide the incoming Board Chair's information below.**

Incoming Board Chair First Name:

Incoming Board Chair Last Name:

Incoming Board Chair Preferred or Nickname:

Incoming Board Chair Email:

Incoming Board Chair Phone Number:

**Does your incoming Board Chair support the project?** Yes/No

**If your incoming Board Chair does not support the project or you are unsure of their opinion, please elaborate.**

## Financial Position

**(Required) What was your total revenue for the most recently completed Fiscal Year?**

**(Required) What was your total revenue for the Fiscal Year before that?**

**(Required) What were your total expenses for the most recently completed Fiscal Year?**

**(Required) What were your total expenses for the Fiscal Year before that?**

**Please provide any additional information about your finances.**

## Other Organization Details

**(Required) How has your organization evolved over the last three years?**

**(Required) Please outline any major activities or events your organization will engage in during the course of the project (e.g., acquisitions/partnerships, milestone anniversary, accreditations, litigation, executive searches, relocation, etc.).**

**(Required) If selected as a Compass Pro Bono client, do you anticipate using other consultants (paid or pro bono) during the course of the project?** *Please note that Compass Pro Bono does not conduct projects with organizations that anticipate using other strategy or management consultants during the Compass Pro Bono project period.*

Yes/No

**If you plan on using other consultants during the course of the Compass Pro Bono project, please elaborate.**

## Project Choice

**Service Lines**

Each Compass Pro Bono project is organized under one service line to address your organization's specific challenges.

Please read the [Service Line descriptions](https://compassprobono.org/nonprofits/pro-bono-consulting/#on-track-nonprofit) and select the one that best represents the top priority for your organization.

We strongly encourage you to set up a project scoping call prior to completing an application, please see scheduling info in the introduction.

**(Required)** Service Line:

* Board Development
* Decision Support
* Funding Strategy
* New Ventures
* Organizational Performance & HR
* Partnerships, Collaborations & Mergers
* Strategic Alignment
* Strategic Marketing
* Sustainability Analysis
* Technology, Data, & AI Strategy

**(Required)** Project Focus Area:

*NOTE: Please refer to the online application for the list of activities to select from.*

**(Required) What is the challenge you aim to address with a Compass Pro Bono project?**

*For the New Ventures Service Line, describe the new venture and stage of development.*

**(Required) What are your objectives for this project? Why is this a priority for your Board and organization? How does the proposed Compass project support your organization’s strategy or strategic plan?**

**[Decision Support Projects Only] To the best of your knowledge at this point, please identify the 3-4 highest priority areas where you may need to make decisions over the next 12 months.**

* Program Adjustments
* Staffing and Management
* Finances
* Marketing and Communications
* Operations
* Collaborations or Mergers
* Other, please elaborate:

**(Required) To the best of your knowledge at this point, what activities do you envision your Compass Pro Bono team conducting to achieve the objectives of your proposed project?** Please check any that seem appropriate and/or add others.

*NOTE: Please refer to the online application for the list of activities to select from.*

**If you selected “other,” please elaborate:**

**(Required) 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)**

**(Required) 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)

*NOTE: Please refer to the online application for the list of achievements and capabilities.*

**If you selected “other,” please elaborate:**

# Final Confirmation

**(Required) We certify that our Executive Director has read the application.** Yes/No

**(Required) We certify that our Board Chair has read the application.** Yes/No

**If you answered "No" to either question above, please explain.**

**How did you hear about this particular Compass Pro Bono opportunity?**

* We are a previous Compass Pro Bono client
* We are a previous Compass Pro Bono applicant (not selected)
* Online search
* LinkedIn or other social media
* Referral from a Foundation or Community Partner
* Referral from another Nonprofit
* Referral from an Individual
* Referral from some other source

**If you indicated that you were referred to us, please elaborate:**

## Supporting Documentation

Please submit the following documents through the portal as part of your application.

1. A list of board members and their professional affiliations (Required)

2. A copy of your most recently 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)