



**Strategic Plan  
2017-2022**

## **MISSION**

Compass' mission is to inspire  
business professionals to engage with local nonprofits  
to transform their communities.

## Letter From The President

A city with an engaged business community has the greatest potential for creating a vibrant and equitable place for all residents to live. When people in the business community engage as donors, volunteers, board members, mentors, and coaches, entire cities benefit. However, despite best intentions, business people who want to use their skills to give back often lack an easy way to do so. Over the past 16 years, Compass has created and refined a program that provides easy access for business professionals looking to give back.

Compass' last strategic plan, which covered 2011-2017, established the bold goal of expanding the Compass program beyond its initial home of Greater Washington DC to other major metropolitan areas in the country. As a result, we successfully launched Compass in Philadelphia and Chicago. Those expansion efforts taught us a lot about managing multiple cities, with boards and staff in different locations. The expansions also raised more questions than we could have imagined. Despite some similarities, both cities were unique in their own way and challenged us in ways we didn't foresee. We learned many valuable lessons, which will guide us as we move ahead to more cities. Most of those lessons are addressed in this new strategic plan. Here's what we learned:

- The quality of our volunteer and client experience is always our highest priority
- We have to balance what must be common across Compass with the needs of each city
- We cannot grow without the internal infrastructure to support a complex organization
- We support nonprofits better as a multi-city operation, because we share best practices
- Fundraising is initially challenging in each new city, but our impact becomes evident quickly
- Even when we think our program is set, we must be open to new opportunities to meet the changing needs of nonprofits

The most important thing we confirmed over the past five years is that the Compass model works in different cities, because it meets a unique need of both business professionals and nonprofit leaders. In every city, there are business professionals who want to use their professional skills to give back to their community. And in every city, there are nonprofits that need the talent and time of these highly skilled professionals whom they often cannot access.

During a visit to Compass' Chicago office, I met with some Compass volunteers from Chicago's inaugural year of projects. Despite the geographic difference, these volunteers shared the same message that I hear from volunteers in Washington and Philadelphia. They were thrilled at the opportunity to volunteer their time and skills in a way that will have a significant long-term impact on local nonprofits. While landscapes, weather, politics and mindsets may vary across this country, the desire to help others is universal. Compass provides an opportunity for the most skilled business professionals to do just that – in their own backyard.

As a result of the successes in Philadelphia and Chicago, our first goal in this new Strategic Plan is to continue Compass' expansion to other major metropolitan areas over the next five years. We will look for strategic opportunities to bring our impactful programs to other cities. The goals in our new Strategic Plan provide the foundation for this continued national expansion. We are

excited to continue bringing business professionals together with their local nonprofits in new ways and new cities.

Suzanne B. Laporte  
President  
July 2017

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**Goal 1: Continue to increase Compass' national presence through expansion to select, major metropolitan areas and through new opportunities that address nonprofits' most strategic needs.**

Compass has proven the success of its model of engaging the business community with local nonprofits. By addressing the strategic issues facing nonprofits, Compass strengthens nonprofits and, as a result, entire communities benefit. Compass will continue to expand its model to new cities. At the same time, Compass will respond to or initiate efforts to support nonprofit needs as they arise.

**INITIATIVE 1**

Launch Compass' unique volunteerism program in additional cities

**INITIATIVE 2**

In targeted metropolitan areas, create strategic relationships to test engagement and potential

**INITIATIVE 3**

Define "national organization" as a means of guiding expansion and evaluating opportunities

**INITIATIVE 4**

Determine what success looks like in a new Compass city from start-up to ongoing operations

**INITIATIVE 5**

Create a public relations and communications strategy to support expansion and growth and to enhance and reinforce our brand identity

**INITIATIVE 6**

Establish the Jerry Sorkin Center for Nonprofit Governance to deepen Compass' efforts to match and train nonprofit board members

**Goal 2: Continue to provide the highest quality experience for everyone engaging with Compass in order to ensure improved outcomes for local communities.**

At the heart of Compass' program is the experience we provide to volunteers and nonprofit clients. Whether through our pro bono consulting program or board matching program, everyone engaging with Compass must encounter the same, high quality experience.

**INITIATIVE 1**

Ensure pipeline of qualified Project Leaders and team members for consulting projects as well as individual candidates for On Board

**INITIATIVE 2**

Demonstrate high quality, implementable solutions for nonprofit clients to ensure tangible results for nonprofits and communities

**INITIATIVE 3**

Expand system for evaluating and measuring impact in each Compass City at each stage of maturity

**INITIATIVE 4**

Continue encouraging and facilitating the long-term engagement of business professionals with local nonprofits

**INITIATIVE 5**

Create a centralized thought leadership and knowledge management system to support all Compass programs and cities

**INITIATIVE 6**

Develop communications strategies, mechanisms and channels to promote information sharing between Compass Cities, as well as the national office, to encourage program innovation

**Goal 3: Become a leader in supporting nonprofits that need assistance when they are considering or implementing a merger.**

Mergers can offer tremendous opportunities to nonprofits when done carefully and thoughtfully. For some organizations, a merger can provide financial relief by reducing or streamlining costs. In other cases, nonprofits merge for strategic reasons that create a stronger organization with more robust programs. When nonprofit leaders decide to consider or pursue a merger, they need strategic assistance just as companies do in the private sector. Few resources exist for those organizations. Compass can access business professionals with the experience needed to support nonprofits requesting assistance with a merger. At the same time, Compass can become a trusted expert in helping nonprofits, foundations, and donors understand the intricacies of nonprofit mergers.

**INITIATIVE 1**

Build an expertise in nonprofit mergers

**INITIATIVE 2**

Create a hub with dedicated staff to support requests for nonprofit merger assistance

**INITIATIVE 3**

Identify the types of services that Compass might provide to nonprofits requesting support

**INITIATIVE 4**

Leverage existing relationships in the business community to engage the most appropriate volunteers

**INITIATIVE 5**

Pilot a new program or programs to explore the role Compass can play in providing support to nonprofits

**INITIATIVE 6**

Establish metrics to measure success and use them to evaluate impact on nonprofits and the sector

**INITIATIVE 7**

Capture lessons learned around nonprofit mergers, and share best practices and other knowledge externally

**Goal 4: Build the internal infrastructure and technology capabilities to support a growing, national organization.**

Growth brings challenges to the most robust organizations. For a small but nimble organization like Compass, managing growth includes protecting current assets while thoughtfully adding the capacity required for new endeavors and opportunities. Addressing internal needs will enable Compass to continue supporting local nonprofits.

**INITIATIVE 1**

Develop a scalable infrastructure that meets the needs of a growing national organization

**INITIATIVE 2**

Ensure the entire Compass organization has sufficient capacity and talent to achieve the outcomes identified in the Strategic Plan

**INITIATIVE 3**

Establish standard information and operating procedures across the organization without becoming bureaucratic

**INITIATIVE 4**

Enhance internal technology capabilities that can be utilized across all Compass Cities to promote information sharing and learning

**INITIATIVE 5**

Explore enterprise technology solutions that will maximize the effectiveness of, and enhance the experience of, business and nonprofit professionals involved with Compass

**INITIATIVE 6**

Utilize social media to support a vibrant community of business professionals and nonprofits engaged with Compass

**Goal 5: Establish systems and processes to generate sustainable funding to enable Compass to thrive in existing cities and expand to new ones.**

Compass leverages donations to support dozens of nonprofits each year at a high return on investment. As the needs of the organization require greater infrastructure and capacity, funding requirements also increase. Compass will continue to build and expand its funding base by engaging existing donors in the organization's exciting work, as well as pursuing new support from those interested in our geographic expansion and new programs. Resources from Compass donors work smarter because each dollar donated translates into a much higher value of support back to local nonprofits and communities.

**INITIATIVE 1**

Create a fundraising plan for Compass at the national and local levels

**INITIATIVE 2**

Continue to encourage and support major gift donations

**INITIATIVE 2**

Pursue partnership and funding opportunities from national foundations and corporations to support national expansion

**INITIATIVE 3**

Create multi-year budget forecasts that align the required costs of supporting operations with realistic fundraising expectations

**INITIATIVE 4**

Regularly determine and communicate Compass' value proposition to support fundraising at all levels of the organization

**INITIATIVE 5**

Leverage technology to support fundraising and increase fundraising capabilities

**Goal 6: Ensure the governance practices that provide a strong back bone for both the national board and local city boards.**

Increasing complexity can be safely assured with appropriate governance as a partner along the way. Any growth must be accompanied by a parallel effort at keeping governance processes updated, adequate and relevant for the changing organization.

**INITIATIVE 1**

Determine and establish the structure for a national board, as well as the appropriate role for local boards

**INITIATIVE 2**

Establish process and recruit nationally-minded and experienced professionals onto the national board

**INITIATIVE 3**

Continue to reevaluate Compass' legal and governance structure in concert with expansion to additional cities

**INITIATIVE 4**

Advance board education to ensure board best practices for Compass boards in all cities with special attention to board recruiting, board member support, and use of board committees

**INITIATIVE 5**

Determine when Compass' intellectual property should be secured and, in those cases, secure ownership and control

**2016 - 2017**  
Compass Board of Directors

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