

# 2019 Stanford ACT Nonprofit Business Management Consultation

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*Community Foundation for Monterey County*

## *Application Tips and Instructions*

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Nonprofit Business Management Consultations with Stanford ACT are intended to help an organization make progress in addressing special, non-recurring business and management situations within the organization. Nonprofit organizations working in all fields are invited to apply for these consultation services.

Consultations may be used for a broad range of capacity-building activities including, **but not limited to:**

- Business model analysis
- Business plans for specific projects
- Financial evaluation, planning and reporting
- Marketing and branding
- Organizational business model development
- Organizational development
- Strategic planning
- Board development and governance

### **Application Tips**

1. Review the information on CFMC's website [www.cfmco.org/stanfordact](http://www.cfmco.org/stanfordact) before beginning your application. Read all the application questions before starting to write.
2. Be clear and concise in your responses. Your narrative application (Questions 10-15) should be no more than three pages, and less is preferred.
3. Have someone review your document to ensure clarity. If they have questions, so will our reviewers.
4. Save your application as a PDF file and email it to [kaki@cfmco.org](mailto:kaki@cfmco.org) before 5 PM on January 25, 2019.

For questions, including fiscally sponsored groups, please contact Kaki Rusmore at [kaki@cfmco.org](mailto:kaki@cfmco.org) or 831.375.9712 x124.

## *Organization Information*

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### **1. Organization Name and Tax ID/EIN number**

### **2. Organization's Mission Statement**

If the organization does not have a written mission statement, what is the primary purpose of the organization? (No more than 30 words)

### **3. Year Organization was founded**

### **4. Organization History**

Provide a **brief** history of the organization. (No more than 75 words)

### **5. Board of Directors**

List all board members, noting officers.

### **6. Board Committees**

List all board committees.

### **7. Organization's Staffing**

Describe the organization's staffing (FT, PT and active volunteers).

### **8. Profit & Loss or Statement of Activities**

Include a profit and loss statement for the most recently completed year, listing income and expenses in your final PDF document.

### **8. Organization's Annual Budget**

### **9. Organization's Primary Funding Source**

## *Application –This section should be no more than 3 pages*

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### **10. Project Name**

Provide a brief one-line phrase to describe this request. This phrase serves as the title of your request in our records. Examples include "analysis of financial management system" or "development of business plan for key programs".

**11. What are the pressing issues the organization faces?****12. What assistance do you seek from Stanford ACT?**

And how would you define a successful outcome of the Stanford ACT engagement?

**13. Which area of consulting most closely describes the services you are requesting?**

Business plans for projects/programs  
Governance/Board development  
Financial analysis and planning  
Marketing and branding  
Organizational development  
Strategic planning  
Other (explain briefly)

**14. If Stanford ACT is unable to assist you at this time, how will you address these issues?****15. What other information should Stanford ACT and the Community Foundation for Monterey County consider in evaluating your request?**

### *Organization Agreement*

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We, the undersigned, confirm that we are committed to supporting and engaging with the Stanford ACT consulting process, which does require time and energy of key staff and board, and are ready to consider recommendations and implement those with which we concur.

We, the undersigned, certify that the practices of this organization conform to the non-discrimination policy as follows. This organization does not discriminate in its employment practices, volunteer opportunities or delivery of programs on the basis of race, religion, gender, national origin, age, disability, veteran status, marital status, sexual orientation, or any other characteristics protected by law.

We, the undersigned, hereby state that the information presented in this application is complete and factual. By typing our names below and submitting this application, we confirm our authority and have notified and secured approval from all parties. We hereby agree that Stanford ACT consulting services, if approved, will be used only for the purpose described above and as further developed in consultation with the pro bono consultants, unless written approval from the Community Foundation for Monterey County is received.

**Name of Authorized Board Member**

**Name of Executive Director or other Authorized Representative (with title)**