

## Endeavour Volunteer Consulting for Non-Profits Sample Project Application and Instructions

Endeavour Volunteer Consulting for Non-Profits (Endeavour) provides management consulting to enable non-profit leaders to improve organizational performance and social impact. We are a volunteer organization that serves non-profits that otherwise cannot afford professional consulting.

### **Eligibility Requirements**

To be eligible for Endeavour's consulting service, your organization must meet the following requirements:

#### **1. Non-Profit Incorporation/Charitable Registration**

Your organization is incorporated as a non-profit organization or registered as a charity in Canada.

#### **2. Social Mission**

Your organization's mission must be focused on solving a social problem.

#### **3. Annual Budget Under \$2 Million**

Your organization's budget must be \$2 million or less. Organizations with an operating budget under \$2 million that are part of a larger organization (e.g. hospital/university) with a budget over \$2 million are not eligible.

#### **4. Human Resource Capacity**

Your organization must have a Board of Directors with volunteers/staff with the capacity to implement the recommendations resulting from the consulting engagement.

#### **5. In Operation for 2+ Years**

Your organization or your parent organization must have been in operation for at least two years, with demonstrable achievements.

#### **6. Local Operations**

Your organization must operate locally within Canada. You may be a local/regional/provincial/national/international organization. Applications from international development organizations that operate in Canada and work with stakeholders (e.g. donors, sponsors) in Canada will be considered. Note that preference will be given to organizations in the Greater Toronto Area since Endeavour volunteers are located in the GTA. If you are located outside of the GTA, please contact our Director of Client Relations at [contact@endeavourvolunteer.ca](mailto:contact@endeavourvolunteer.ca) before applying.

#### **7. Two Project Sponsors**

Your organization must provide two key contacts at the executive and board levels who will act as project sponsors for the entire duration of the engagement. These contact persons must be accessible by email and telephone on a regular basis, and at least one of these contacts must be able to meet with the consulting team in the Greater Toronto Area during the engagement outside regular work hours.

### 8. Strategic Management Focus

Your organization must have a project that requires strategic management advice within one of Endeavour’s practice areas. Please note that Endeavour does not provide the following services: implementation of our advice to clients; fundraising strategies; compensation strategies; workshop facilitation; coaching/training; grant proposal writing; and writing/editing for formulated strategies/plans. Learn more about our practice areas in [What We Offer](#).

### 9. Six-Month Project Timeline

Your organization must have a project that can be completed in six months. While there is an opportunity to engage Endeavour again, we generally advise clients to re-apply after recommendations from the prior engagement have been implemented.

### 10. Project Expenses

Your project must not require Endeavour or its volunteers to incur expenses. This excludes general expenses associated with commuting within the Greater Toronto Area.

### 11. Post-Engagement Evaluation

Your organization must be committed to a post-engagement evaluation, including developing success metrics with the consulting team and cooperating in follow-up meetings with the Endeavour executive team to measure project success.

If you have questions about your organization’s eligibility, please get in touch with our Director of Client Relations at [contact@endeavourvolunteer.ca](mailto:contact@endeavourvolunteer.ca).

### Client Selection Process and Timeline

Because Endeavour receives more project applications from non-profit organizations than we can work with, we have developed rigorous screening and selection processes and criteria to help us identify organizations that are most likely to benefit from our services. Please consult the table below for our selection process and important dates.

Step	Fall/Winter Cycle	Spring/Summer Cycle
Application Deadline	Early June	Early December
Interviews*	Late June to Mid-August	Late January to Mid-February
Decision	Late August	Late February
Consulting Agreement	Early to Mid-September	Early to Mid-March
Project Start	Late September	Late March
Project Close	Late March	Late September

### **Tips for submitting a successful application**

- We like to see a well thought-out and well-written submission. Complete the application to the best of your abilities, be transparent and detailed.
- We like to see a good decision-making structure, and internal resources to execute the work.
- We like to see a clearly defined problem and project goals.
- We like to see that you have a support from your board of directors.

### **Tips for submitting the online application form**

- We strongly recommend that you complete the application in a SEPARATE DOCUMENT (which you can save and then copy + paste into the online form). Unfortunately, the only form currently doesn't allow you to save the information, you can only submit it all at once. We are working on improving the online form for next rounds.
- Complete all required fields (with asterisk\*). If your application was successfully submitted, this confirmation will appear on your screen: "Thank you for applying to work with Endeavour. We will review your application and contact you should we have any questions. Short-listed candidates will be contacted for an interview." You will also see a summary of your application at the completion of your application.

### **Donations to Endeavour**

Thank you for considering our service. Since our services are free, we encourage satisfied clients at the end of the consulting engagement to make a donation to Endeavour. Your donation will help to pay it forward so we can continue providing our service offerings to non-profits like yours.

Donations may be made at [endeavourvolunteer.ca/donate](http://endeavourvolunteer.ca/donate).

### **Questions?**

Please contact the Director of Client Relations at [contact@endeavourvolunteer.ca](mailto:contact@endeavourvolunteer.ca).

**SAMPLE ONLY** - please note the application must be filled out online here:  
<https://endeavourvolunteer.ca/non-profits/apply-now/>

## Endeavour Volunteer Consulting for Non-Profits Project Application Form

SECTION 1: ORGANIZATION INFORMATION	
<b>* Required</b>	
We work with registered non-profit and charitable organizations in Canada that are staffed by volunteers or employees, have demonstrable achievements, have been in operation for a minimum of two years and have an operating budget of about \$2 million or less. Please note that you have to comply with all 11 eligibility criteria ( <a href="http://endeavourvolunteer.ca/non-profits/ready-for-endeavour/eligibility-requirements">endeavourvolunteer.ca/non-profits/ready-for-endeavour/eligibility-requirements</a> ).	
Organization (Legal organization name) *	
Organization Operating Name (if different from legal name)	
Website *	
Head Office Address *	
<i>Please use the following format: Number Street Name, Postal/ZIP Code, City, Province/State, Country</i>	
Year Established *	
Non-Profit Incorporation Year *	
Non-Profit Incorporation Number (if Non-Profit) *	
Charitable Registration Year (if Charity)	
Charitable Registration Number (if Charity)	
Most Recent Fiscal Year-End Revenues *	
Most Recent Fiscal Year-End Expenses *	
If your organization is a part of larger organization, please describe briefly the organizational structure and funding. *	
<i>E.g. provincial/territorial/local affiliates/branches/offices with a central organization. If this doesn't apply to your organization, please write n/a.</i>	
Returning client *	
<i>If you are returning client, briefly describe what was the project scope for your last Endeavour engagement. Did you implement any of the recommendations? Why did you decide to engage Endeavour again? If this doesn't apply to your organization, please write n/a.</i>	

Current Number of Board Members *	
Current Number of Paid Staff *	
Current Number of Volunteers *	
Key Decision-Makers in Organization * <i>E.g. board, executive staff, committees, etc.</i>	
Functioning of Board of Directors * <i>Briefly describe how does your board of directors functions (e.g. what is your board's structure; policy board vs. operational board; strengths and weaknesses)</i>	
Year of Most Recent Strategic Plan * <i>Write n/a if you don't have strategic plan</i>	
Sector * <i>Select all that apply:</i>	
<input type="checkbox"/> Arts/Culture/Heritage <input type="checkbox"/> International Development <input type="checkbox"/> Children/Youth/Family Services <input type="checkbox"/> Poverty Relief <input type="checkbox"/> Disabilities <input type="checkbox"/> Research/Policy Development <input type="checkbox"/> Education <input type="checkbox"/> Rural Development <input type="checkbox"/> Environment <input type="checkbox"/> Skills Development/Training <input type="checkbox"/> Health <input type="checkbox"/> Seniors <input type="checkbox"/> Human Rights/Civil Liberties <input type="checkbox"/> Social Justice <input type="checkbox"/> Immigrant Services <input type="checkbox"/> Women <input type="checkbox"/> Other: _____	
Region Served * <i>Select all that apply:</i>	
<input type="checkbox"/> Local <input type="checkbox"/> Provincial <input type="checkbox"/> National <input type="checkbox"/> International	
Mission *	
Groups served * <i>Describe briefly.</i>	

<p>Other stakeholders *</p> <p><i>Briefly describe organizations, groups and/or persons that are affected or can be affected by your organization's actions.</i></p>	
<p>Current Programs in Operation &amp; Impact *</p> <p><i>Describe briefly and include any qualitative or quantitative information available on your organization's impact.</i></p>	
<p>Future Programs Planned (if applicable)</p> <p><i>Describe briefly.</i></p>	

**SECTION 2: KEY INFORMATION FOR CONSULTING PROJECT**

\* Required

In what area do you need our help? \*

*We do not provide the following services: fundraising strategies, HR compensation strategies, strategy implementation, financial reporting/auditing, workshop facilitation, training, or report writing/editing/design. To learn about our 4 service areas and for more information please consult:*

[endeavourvolunteer.ca/non-profits/services](http://endeavourvolunteer.ca/non-profits/services)

*Please choose ONE of the following options:*

Corporate Strategy

*(Visioning / Strategic Planning / Portfolio Strategy / Business Planning / Feasibility Study / etc.)*

[endeavourvolunteer.ca/non-profits/services/strategic-planning](http://endeavourvolunteer.ca/non-profits/services/strategic-planning)

<input type="checkbox"/> Marketing Strategy <i>(Client - Member Segmentation / Branding / Pricing / Outreach Strategy / Feasibility Study / etc.)</i> <a href="http://endeavourvolunteer.ca/non-profits/services/marketing-effectiveness">endeavourvolunteer.ca/non-profits/services/marketing-effectiveness</a>	
<input type="checkbox"/> Operations Strategy <i>(Financial Management / Process Redesign / Delivery Model / Infrastructure / Feasibility Study / etc.)</i> <a href="http://endeavourvolunteer.ca/non-profits/services/operational-efficiency">endeavourvolunteer.ca/non-profits/services/operational-efficiency</a>	
<input type="checkbox"/> Organizational Strategy <i>(Organizational Design / Volunteer Management / Succession Planning / Change Management / Feasibility Study / etc.)</i> <a href="http://endeavourvolunteer.ca/non-profits/services/organizational-strength">endeavourvolunteer.ca/non-profits/services/organizational-strength</a>	
Problem Definition *  <i>Based on your choice above (strategy area), please describe in detail the main problem you would like to resolve during this consulting engagement.</i>	
Other problems that the organization is facing *  <i>Briefly describe what other problems is your organization facing (in addition to the main problem).</i>	
Expected Goal *  <i>Describe what does your organization hope to achieve through working with Endeavour.</i>	
Expected Implementation of recommendations *  <i>Briefly describe who will most likely implement the recommendations from the Endeavour consulting engagement? What is the expected timeframe for the implementation? (Please note that the consulting project will take about 6 months.)</i>	
Constraints related to Project *  <i>Briefly describe what constraints do you face related to completing this project.</i>	
When do you need to start and finish the project? *  <i>Are there any deadlines that you need to adhere to?</i>	
Resources Available to Consulting team *  <i>What resources are available to the consulting team? Select all that apply:</i>	
<input type="checkbox"/> Current and historical financial statements <input type="checkbox"/> Current strategic plan	
<input type="checkbox"/> Current by-laws <input type="checkbox"/> Space for client-consulting team meetings	
<input type="checkbox"/> Other: _____	

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<b>SECTION 3: KEY CONTACT INFORMATION</b>	
<b>* Required</b>	
Your organization must provide two key contacts for the project at the executive and board levels. The key contacts must be accessible by email and telephone on a regular basis, and can meet with the consulting team in the Greater Toronto Area during the six-month engagement, including outside regular work hours on weekday evenings and/or weekends.	
<b>Key Contact - Executive Level (main point of contact for Endeavour): *</b>	
<i>This individual has the authority to bind your organization in a consulting agreement with Endeavour and to make decisions for your organization.</i>	
First Name and Last Name *	
Position Title *	
Length with organization *	
Email *	
Telephone *	
Office Address *	
<i>If the Office Address is same as the Head Office Address, please write n/a.</i>	
Time commitment to work on the Endeavour consulting project over six months *	
<i>How many hours per week are you willing and able to commit to working on the Endeavour consulting project over six months? (The six-month period is approximately mid-March to mid-September for spring/summer consulting cycle and mid-September to mid-March for the fall/winter consulting cycle.) Please select one:</i>	
<input type="checkbox"/> 2-3 hours/ week <input type="checkbox"/> 3-5 hours/ week <input type="checkbox"/> 5+ hours/week	
Preferred method of communication *	
<i>What is your preferred method of communication? Please select one</i>	
<input type="checkbox"/> Phone <input type="checkbox"/> Email <input type="checkbox"/> In-person meeting <input type="checkbox"/> Other: _____	
Preferred frequency of communication *	
<i>How frequently would you prefer to communicate with the consulting team? Please select one:</i>	
<input type="checkbox"/> Daily/Almost daily <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Monthly	



<b>Key Contact - Board Level: *</b>	
<i>This individual is a board member that is actively involved in the organization.</i>	
First Name and Last Name *	
Position Title *	
Length with organization *	
Email *	
Telephone *	
Office Address *	
<i>If the Office Address is same as the Head Office Address, please write n/a.</i>	
Time commitment to work on the Endeavour consulting project over six months *	
<i>How many hours per week are you willing and able to commit to working on the Endeavour consulting project over six months? (The six-month period is approximately mid-March to mid-September for spring/summer consulting cycle and mid-September to mid-March for the fall/winter consulting cycle.) Please select one:</i>	
<input type="checkbox"/> 2-3 hours/ week <input type="checkbox"/> 3-5 hours/ week <input type="checkbox"/> 5+ hours/week	
Preferred method of communication *	
<i>What is your preferred method of communication? Please select one:</i>	
<input type="checkbox"/> Phone <input type="checkbox"/> Email <input type="checkbox"/> In-person meeting <input type="checkbox"/> Other: _____	
Preferred frequency of communication *	
<i>How frequently would you prefer to communicate with the consulting team? Please select one:</i>	
<input type="checkbox"/> Daily/Almost daily <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Monthly	
In addition to the key contacts, the consulting team may interact with:	
<i>Select all that apply:</i>	
<input type="checkbox"/> Other board members <input type="checkbox"/> Other executives <input type="checkbox"/> Staff members <input type="checkbox"/> Volunteer	
<input type="checkbox"/> Clients <input type="checkbox"/> Sponsors <input type="checkbox"/> Donors <input type="checkbox"/> Partners	

SECTION 4: OTHER INFORMATION	
<p><b>* Required</b></p> <p>How did your organization learn about Endeavour's consulting service? *</p> <p><i>Select all that apply:</i></p> <p> <input type="checkbox"/> Endeavour Volunteer                      <input type="checkbox"/> Endeavour Client (other non-profit organization)  <input type="checkbox"/> Endeavour Partner/Supporter           <input type="checkbox"/> Endeavour Mailing List (direct email)  <input type="checkbox"/> Charity Village                                   <input type="checkbox"/> LinkedIn  <input type="checkbox"/> Twitter    <input type="checkbox"/> Online Search Engine  <input type="checkbox"/> Other: _____         </p>	
<p>Are you currently working with other consultants? Or do you have plans to work with other consultants concurrently with Endeavour? If so, what would they be working on? *</p>	
<p>In case you may not have been selected for an Endeavour consulting engagement, would you be interested in a referral to our partners providing similar services?</p> <p><i>If you select yes, we might share your email address with our partners providing similar management consulting services (only in the case that you are not selected for Endeavour consulting engagement).</i></p>	<p> <input type="checkbox"/> Yes  <input type="checkbox"/> No         </p>

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