# Match for Change Organizational Application

## Introduction

PREVIEW ONLY!

You must fill out the application online for it to be formally submitted.

Hello, and welcome to CORE's Match for Change application. This is the application for *organizations* seeking to find the right kind of outside help for a capacity-building project. If you are applying as a consultant/trainer/provider, please go here instead.

Please thoroughly review the information on our website before proceeding, including the overview of the process and timeline, our definitions, eligibility criteria, and confidentiality policy which explains how the information you provide here will be shared during the CORE process.

The application should be filled out by a key leader in your organization, or by a team that includes people with in-depth knowledge about the organization. It takes less than an hour to fill out. You can stop part way through and come back to it later if needed. (**See the "Save and Continue" bar at the very bottom of the screen**). Please answer all of the application questions to the best of your ability. While they will take some thought and perhaps discussion with other members of your organization, we expect you will find the process useful in clarifying your organization's capacity-building goals.

After you submit the application, if your organization is accepted we will send a brief email outlining details of the rest of the process. This email will include a link to a Paypal screen for you to pay your $50 participation fee. Your prompt attention to this confirmation and payment request email is greatly appreciated.

As always, if you have any questions, contact us through the CORE website.

We thank you for being part of this new approach to community change-making with us!

Throughout this application, we will be using certain terms like "organization," "board," and "executive director" that may or may not apply to your group. Please translate as needed to terms that are suitable to your group and are useful in answering the questions. (E.g. "group" or "project" instead of "organization" if you are not a formal organization; "elders" or "steering committee" instead of "board"; "pastor" or "lead organizer" for "executive director," etc).

1. CORE's is committed to building a just, peaceful, sustainable world. Do you represent an organization or group working towards one or more of these goals? *

- Yes
- No

Comments

* indicates a required question

**Screening**

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2. Is your group seeking an outside consultant, coach, or trainer to help you build your capacity? (See our definition of what we mean by capacity building on our website.) *

- ○ Yes, we seek someone to help improve our internal or relational processes so we can better use our resources to achieve our mission more effectively, sustainably, and joyfully.
- ○ Not sure, we're filling out this application to help figure out what we want.
- ○ No, we seek someone to help with a technical issue or to outsource a specific activity to.
- ○ No, we have selected a consultant and seek ways to support that relationship (e.g. contracting support, funding).

Comments

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## Contact and Background Information

3. Please provide the following information about your organization.

Organization Name *

Street Address

City *

State *

Zip

Best daytime phone
(please use format xxx-xxx-xxxx) *

Other phone
(please use format xxx-xxx-xxxx)

Web site

4. Are you filling out this application as an individual, or as a team?

- Individual
- Team (please describe) *

5. Please provide the following information about you, the person filling out this application (or the lead contact person if a team is working on it together).

First Name *

Middle Initial

Last Name *

Email Address *

Best daytime phone
(please use format xxx-xxx-xxxx) *

Other phone
(please use format xxx-xxx-xxxx)

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6. What is your role with the organization? Please check all that apply if you have more than one role or if more than one of you worked together to fill this out.

- ☐ Executive Director
- ☐ Development Director
- ☐ Training Director
- ☐ Volunteer Coordinator
- ☐ Program Director
- ☐ Program staff
- ☐ Board member
- ☐ Other volunteer
- ☐ Other (specify)

Comments

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7. How long have you been with the group or organization? (If you worked with others to fill this out, please indicate the length of time of the longest-tenured member of the organization who helped).

- Less than one year
- 1 to 2 years
- 3 to 5 years
- 6 to 10 years
- 11 to 19 years
- 20 or more years

Comments

## Successes and Goals

8. What difference is your organization out to make in the world? (This could be from your mission or vision statements if you have them).

9. What recent accomplishments make you especially proud of your organization's work? (Briefly describe one or two).

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10. What things are going particularly well in the organization?

**What, if anything, is getting in the way of making the kind of difference you want to make in the world? Please consider both internal and external challenges or obstacles.**

11. Internal challenges or obstacles (e.g. staffing, board, organizational culture, infrastructure).

12. External challenges or obstacles (e.g. political climate, demographic changes, other organizations in the field)

13. Is this perspective on your goals and challenges widely shared in the organization? If not, please do your best to articulate how others may view it.

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14. Which of these challenges or obstacles are you committed to addressing at this point in time? Or, if you have not yet made a commitment to a specific area, tell us what you consider to be the most important "growing edges" in building your capacity to accomplish the changes you'd like to make in the world.

15. What have you figured out so far about the kinds of support you might need to do this capacity building?

16. What results would you like to achieve by working with someone from outside your organization on these challenges?

## Organizational History & Structure

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17. When was your organization or group formed?

- ○ Less than one year ago
- ○ 1 to 2 years ago
- ○ 3 to 5 years ago
- ○ 6 to 10 years ago
- ○ 11 to 19 years ago
- ○ 20 or more years ago
- ○ Don't Know

18. Is your organization designated as one or more of the following (check all that apply if you have multiple interrelated entities).

- ☐ 501 (c) 3
- ☐ 501 (c) 4
- ☐ No formal IRS status
- ☐ We have another organization operating as our fiscal sponsor for IRS purposes (specify name of fiscal sponsor) _____ *
- ☐ Other _____

19. How many FTE paid staff, if any, does your organization have? (please check the most appropriate answer):

- 0
- 0.5
- 0.75
- 1
- 2-4
- 5-10
- 11-20
- 21-50
- 51 or more
- Don't Know

20. How many people serve on your Board of Directors?

21. How long has the longest-tenured Board member been serving?

- Less than one year
- 1 to 2 years
- 3 to 5 years
- 6 to 10 years
- 11 or more years

22. How long has the newest Board member been serving?

- Less than 2 months
- 2-11 months
- 1 to 2 years
- 3 to 5 years
- 6 to 10 years
- 11 or more years

Comments

23. Approximately what percentage of your board's time is spent on the following?

- Operations/Programming
- Vision/Strategy
- Fundraising
- Policy and Governance (including hiring, supervising, evaluating ED)
- Other

0 out of 100 Total

Comments

24. Besides the Board, how many active volunteers, if any, does your organization have? (please check the most appropriate answer):

- ○ 0
- ○ 1
- ○ 2-4
- ○ 5-10
- ○ 11-20
- ○ 21-50
- ○ 51 or more
- ○ Don't Know

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25. What kinds of methods and activities does your organization use to accomplish its mission? (Please check all that apply):

- ☐ Community Development
- ☐ Community Organizing
- ☐ Cultural Activities
- ☐ Direct Service
- ☐ Education/Outreach
- ☐ Electoral Work
- ☐ Issue Advocacy
- ☐ Other (please specify)

Comments

26. In what geographic area(s) do you concentrate your primary efforts? (check more than one if needed)

- ☐ Madison
- ☐ Dane County
- ☐ South-central Wisconsin
- ☐ Milwaukee
- ☐ Wisconsin
- ☐ Midwest
- ☐ United States
- ☐ North America
- ☐ Other (please describe)

Comments

27. What is the size of your annual budget?

- 0, no budget
- $1 to $10,000
- $10,001 to $50,000
- $50,001 to $100,000
- $100,001 to $250,000
- $250,001 to $1 million
- $1,000,001 to $5 million
- $5,000,001 or above

Comments

## Organizational Assessment

28. Has your group recently undertaken an organizational assessment to identify your capacity- building priorities?

- Yes
- No
- Don't know

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29. (If yes,) Please describe the process you used and what you discovered:

30. Please tell us how much you agree or disagree with the following statements about your group or organization.

| | Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|---|
| We have a vision that is clearly understood and shared within our organization. | | | | | |
| Actions and programs of the organization are clearly aligned with our mission statement. | | | | | |
| Work and action plans are well developed and followed. | | | | | |
| We have a good system in place to evaluate our outcomes and learn from our experiences. | | | | | |
| We have effective decision-making procedures. | | | | | |
| We have an effective process for resolving conflicts when they arise. | | | | | |
| Staff leadership is effective. | | | | | |
| Board leadership is effective. | | | | | |
| Leadership is shared when appropriate. | | | | | |
| The founder of our organization makes all of the significant decisions. | | | | | |
| There is a high level of trust within the organization. | | | | | |
| We have skills in cultural competency (working with diversity of race, ethnicity, income, ability, etc.). | | | | | |
| We are good at mobilizing and managing the work of volunteers. | | | | | |
| We have good relationships with other organizations and players in our field (e.g. other groups doing related work; elected officials; etc. ) | | | | | |
| We pay attention to whether and | | | | | |

| | | | | | |
|---|---|---|---|---|---|
| how the organization needs to adapt to our changing environment. | | | | | |
| At the rate we are going, we could financially sustain the work we are doing for the next three years. | | | | | |
| At the rate we are going, we could emotionally sustain the work we are doing for the next three years. | | | | | |

Comments

31. After having completed the self-assessment questions above on various aspects of organizational life, are there any new thoughts or "ahas" about the "growing edges" you might want to work on with a consultant?

## Readiness

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32. Please indicate your level of agreement or disagreement with the following statements about your organization's desire for change.

| | Strongly agree | Agree | Neutral | Disagree | Strongly disagree |
|---|---|---|---|---|---|
| We recently had a "wake-up call" | | | | | |
| We are in crisis | | | | | |
| The people in our organization with the power to make the changes we need are on board with this capacity-building project | | | | | |
| We are able & willing to step outside our normal ways of thinking and acting | | | | | |
| We are prepared to set aside other tasks to make this capacity-building project work | | | | | |

Comments

33. Please indicate here any values your organization holds that you feel it is important for a consultant you work with to share.

34. Do you need a bilingual consultant, and if so, what languages?

- [ ] English
- [ ] Spanish
- [ ] Hmong
- [ ] Other _____ *

Comments

_____

35. Do you have funds set aside in your budget to hire a consultant?

- ○ Yes, we have the full amount, we are not seeking funding from CORE
- ○ Yes, we have enough to cover the 50% match if we get CORE funding
- ○ No, we have not yet budgeted any funds for this project

36. If you have not yet done so, how would you go about raising the 50% match?

_____

37. Have you thought about the funds it might take for follow-up and implementation after the consulting project?

- Yes
- No

38. How would you go about raising these funds?

39. If this project moves forward, you will need an organizational point person to lead the consultant selection process and be the primary contact with the consultant. This person will work with the consultant to develop a detailed work plan and budget, ensure that your part of the work gets done, and communicate with CORE about the project. Have you identified who that point person will be?

- Yes (please name the person here and specify their role) *
- Not yet (please start thinking about who this would be)

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40. A team of two CORE volunteer Connectors will be contacting you in a few weeks to set up a 90-minute "learning conversation" to discuss in person what kind of capacity building support you are looking for. We suggest you bring 2-3 key leaders from your staff and/or board to this meeting. Please indicate the likely participants from your group in the learning conversation meeting, and if you would like us to include them in scheduling, their email addresses:

| | First Name | Last Name | Position | Email address |
|---|---|---|---|---|
| Person 1 | | | | |
| Person 2 | | | | |
| Person 3 | | | | |

Comments

## Organizational Experiences with Consulting 1

41. Has your organization worked in the past with a consultant, coach, or anyone outside your group to improve your work?

- Yes
- No
- Don't know

Comments

## Organizational Experiences with Consulting 2

If your organization has worked with more than one consultant in the past, please pick the **most recent** time for the following questions.

42. What were the issues that led you to seek help?

43. What were the most helpful aspects of the interaction?

44. What were the least helpful/most unhelpful aspects?

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45. Overall, how satisfied were most folks in your organization with the help you received?

- Very Satisfied
- Satisfied
- Neutral
- Dissatisfied
- Very Dissatisfied
- Not Applicable

Comments

46. If you feel comfortable, please share with us the name of the person you worked with. The information will help us find a good consulting match for you and other groups in the future. Only the CORE staff and the two trained Connectors assigned to you will see this information, and all have signed our confidentiality agreement at: www.consultingforchange.org/matchmaking-confidentiality.html.

Comments

**Lack of Organizational Experience with Consulting**

47. Please indicate the reason or reasons why you have not received help from outside your group or organization. Check all that apply.

- ☐ Didn't have a need
- ☐ Lack of funding
- ☐ Don't know who could provide what we needed
- ☐ Not clear what we needed
- ☐ Didn't trust who we do know
- ☐ The help that was available was not well-suited to our culture/the constituencies we serve. (Please elaborate).
- ☐ Other

Comments

**Thank You!**

Sorry, since your organization does not work in the areas we are focusing on, you don't qualify to apply for Match for Change.

Sorry, since your organization is not seeking help with finding the best capacity building consultant according to our definitions, you don't qualify to apply for this round of Match for Change.

**Congratulations!** You've completed the Match for Change application.

We hope you found it a useful opportunity for reflection.

We look forward to getting to know you better in the future and exploring how we might work together to build our collective strength, courage, and creativity in service of a just, peaceful, sustainable world.

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