



# COMMUNITY FELLOWS



## 2018 Pro Bono Project Proposal

*Note: All proposals must be submitted online by January 30, 2018.  
Use this document to plan and draft your responses.*

## Introduction

Blue Cross and Blue Shield of Louisiana is looking for up to ten pro bono consulting projects that can make good use of the skills our high performing Blue Cross employees have to offer – from legal and financial services to marketing and more.

A Community Fellows pro bono project will take the business and executive talent of a team of Blue Cross employees and match them with a need that can move your organization forward, while building a deep relationship with a leader at one of Louisiana's top businesses. Our employees give thousands of hours each year to volunteering on behalf of the company. Through the Fellowship model, we're helping them get involved in places where they can do the most good.

Our partners at the Louisiana Association of Nonprofit Organizations (LANO) will facilitate the project and oversee its implementation.

Take this opportunity to think creatively and thoughtfully about a project need that, if solved, could build the capacity of your organization for greater good.

**Questions?** Please contact: Ramona Hill at [ramonamarsalishill@lano.org](mailto:ramonamarsalishill@lano.org)

### What will your organization receive as a Community Fellows partner?

- If selected, we will match you with a high performing Blue Cross employee to provide pro bono services to your organization through the end of 2018.
- Your fellowship partner will give you 4-8 hours a month pro bono services within a specific scope of work defined by you and your partner.
- You will receive free Gallup StrengthsFinder or Builder Talent coaching, along with a team building session for up to 15 individuals on your staff or board.

## **What kind of assistance can our employees provide?**

Blue Cross is a large local company, with employees representing every aspect of running our business. We have expertise for projects in:

- Strategic planning, developing program evaluation methods, market research
- Governance issues, including writing bylaws
- Event planning
- Financial and legal assistance
- Communications, marketing and advertising (including graphic design)
- Public affairs, lobbying and advocacy
- Technology and IT
- Social enterprise and entrepreneurship
- Leadership coaching

## **The Community Fellows process:**

- Complete the application
- Deadline for submission is January 30, 2018
- Announcement of applicants will be made by February 14, 2018
- All participants must attend a retreat March 13, 2018.
- Professional development will be offered to all Fellows and organizations. Fellows and organizations will also meet to discuss a project work plan and timeline for the pro bono project.
- Work with organizations will take place March – October 2017.
- In November 2018 LANO will offer an optional Governance training for organizations and Fellows who are interested in becoming board members

## **Nonprofit Eligibility:**

- You must be a 501(c)(3) tax-exempt nonprofit.
- You must be in good standing with all state and federal filings.
- You must meet all of Blue Cross and Blue Shield of Louisiana's other corporate sponsorship eligibility requirements (find them online at [here](#)).

# Section 1: Contact Information

## Organizational Contact Information

- Organization Name
- Street Address
- Apt/Suite/Office
- City, State, ZIP
- Email Address
- Phone Number
- Mobile Phone
- Web URL

## CEO/Executive Director Contact Information

- First/Last Name
- Title
- Email address
- Phone Number
- Mobile Phone

## Person Completing Application

- First/Last Name
- Title
- Email address
- Phone Number
- Mobile Phone

## Section 2: Organizational Background

**Choose up to three issue areas below that describe your organization's mission:**

- Advocacy and Human Rights
- Animals
- Arts and Culture
- Children and Youth
- Community
- Computers and Technology
- Crisis Support
- Disaster Relief
- Education and Literacy
- Emergency and Safety
- Employment
- Environment
- Faith-Based
- Health and Medicine
- Homelessness and Housing
- Hunger
- Justice and Legal
- LGBTQIAA+
- Media and Broadcasting
- People with Disabilities
- Political
- Seniors
- Sports and Recreation
- Veterans
- Women's Issues

**Short answer:**

- What is your organization's mission statement?
- Briefly list the primary programs/services your organization offers.
- Describe the populations you serve and numbers you reach each year.
- Does your organization follow a written strategic plan? If so, when was it developed and what time frame does it cover?
- If you are using a written strategic plan, please upload an executive summary.
- How many years has your organization had its 501(c)(3) designation?
- How many FTE's do you employ?
- How many PTE's do you employ?
- For the last fiscal year, what was your total revenue?
- What were your total expenses?
- Briefly describe any issues that might affect the financial stability of your organization over the next 12 months (e.g., loss of major funders, debt due, leadership change, etc.)
- Briefly outline any major activities and events your organization will engage in during the next 12 months (e.g. acquisitions/partnerships, milestone anniversary, accreditations, litigation, executive searches, relocation, etc.).

## Section 3: Pro Bono Project Proposal

**Briefly describe the pro bono project you have in mind for a Blue Cross employee to help you with.**

Here are a few tips on turning your need into a great project:

- **Articulate a scope with desired outcomes.** Define exactly what you want help with.
- **Is your project urgent?** If so, pro bono services might not be the best solution for you.
- **Keep it short- to medium-term.** You should be able to wrap-up this project by the end of 2017.
- **Prepare project information.** Have the right information and background assembled so that your Fellowship partner can jump in and start helping you right away.
- **Get your team ready.** Your team and board should be committed to this project.

**Which of these best describes the nature of the project you're proposing?**

- Mission and Programs – Strategic Planning
- Mission and Programs – Market Research
- Mission and Programs – Client Needs Assessment
- Mission and Programs – Client Feedback Collection
- Mission and Programs – Program Evaluation
- Governance – Writing Bylaws
- Governance – Mission and Vision Review
- Event Planning, Event Management
- HR-Personnel Policies
- HR – Assessment and Planning
- HR – Recruitment
- HR – Hiring Plan
- HR – Ed/CEO Review
- HR – Performance Management System
- HR – Volunteer Management System
- HR – Training and Development Planning
- HR – Diversity Planning
- HR – Payroll Systems
- Financial and Legal – Accounting Software
- Financial and Legal – Risk Management
- Financial and Legal – Financial Controls
- Financial and Legal – Program Cost Analysis
- Financial and Legal – Scenario Modelling
- Financial and Legal – Audit Planning
- Financial and Legal – Cash Flow Planning
- Financial and Legal – Accounting Systems Advice
- Financial and Legal – Budget Process Design
- Communications – Marketing/PR Plan
- Communications – Branding
- Communications – Social Media Plan
- Communications – Video
- Communications – Annual Reports
- Communications – Websites
- Communications – Review of Communications Materials (proofing)
- Public Affairs and Policy – Lobbying
- Public Affairs and Policy – advocacy
- Technology – Development/Coding
- Technology – IT Support Plan
- Technology – IT Planning
- Technology – Remote Access Setup
- Technology – Backup Plan
- Technology – Database Implementation or Management
- Technology – Hardware/Software Management
- Legal – Intellectual Property
- Legal – Personnel Policies
- Legal – Employee Termination
- Legal – Lease Review
- Social Enterprise (earned income, nonprofit business ventures)
- Leadership Coaching
- Other:

## Scoping Questions:

- What is the deliverable or end product you have in mind?
- Very briefly tell us what the impact of this project will be on your organization.
- Very briefly tell us how this project will improve your impact on the community.
- Can this project be accomplished between March and November 2018 by a small team of Blue Cross employees working with you 4 - 8 hours per month?

## Organizational Readiness Questions:

- Do your executive director/CEO and appropriate staff have the capacity to support the Blue Cross Fellow and provide input during this timeframe?
- Who in your organization will manage this engagement? Why are they the appropriate contact?
- What resources will your organization dedicate to this project?
- What additional resources are needed? Are they in your budget?
- Do the Board, Executive Director, and appropriate staff in your organization currently have the capacity to implement any approved plans or recommendations that the fellow(s) deliver(s) at the conclusion of the project?
- Are there specific challenges that will need to be managed? We appreciate your candor to help ensure success in planning and staffing the project.
- Is your board aware of this project, do they approve it, and are they open to be involved in the scoping and managing of the Fellows pro bono project? **PLEASE NOTE: Before beginning work on your project, we will require a signed board resolution indicating your organization's commitment to the project.**

## Time Expectations:

- It is possible the Blue Cross Fellows will request time with the Executive Director or staff members outside regular business hours. Does your organization have the flexibility for meetings in the evening and/or on the weekends?
- The success of this project also depends on a clear sense of the total number of hours and duration of the work required to successfully complete this project. Please indicate your expectations about the time needed to make this project successful.

## Recognition and Exposure:

- LANO strongly suggests that a Blue Cross Fellow gets early exposure to the direct services provided by nonprofit clients as a way to learn more about the organization that they are serving. Please describe a way in which your organization could provide Fellows with this exposure between March – November 2018.
- Will you provide opportunities for the Blue Cross Fellows to attend board meetings, either as participants or observers?

**Leadership:**

- How long has the Executive Director/CEO been in his or her position?
- Do you expect the Executive Director to continue in this position through December 2018?
- Please provide a short bio of the Executive Director.
- How long has your board chair been in his or her position?
- Will your current board chair stay in his or her position through the end of 2018?
- How will the executive director and board of directors support this project? Please be specific.
- Has the executive director reviewed this application?