



**SOCIAL VENTURE
PARTNERS**

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What change are you striving for? Is there something holding you back? What could you do if you had a network of professionals investing time and talent to strengthen your organization?

About Social Venture Partners and Our Investment Process

Social Venture Partners (“SVP”) builds powerful relationships among people who want to give back and the nonprofits that make change possible. We are a diverse group of individual donors (“Partners”) – business people, entrepreneurs and nonprofit leaders – who combine our skills, resources and networks to help nonprofits succeed. We focus our philanthropy on capacity building, and work with you to strengthen your organization and increase your impact in the community.

Through the Opportunity Review Process, SVP Dallas will review applications from nonprofit organizations that wish to become advisees. If selected, these advisees will receive *pro bono* consulting initially through one short-term capacity building project. SVP partners provide advisees with strategic advice and coaching on the most important challenges or opportunities. After one project is complete, additional projects may be initiated based upon the advisee’s needs and SVP’s fit and capacity. Typically, advisees will stay in the portfolio for no more than 1 year. After one or more advisee project is completed, SVP Dallas and the advisee will determine if it is appropriate for the advisee to apply to become an “investee.” Along with additional *pro bono* consulting over an extended period of time, investees also receive financial grants. SVP Dallas will consider making a financial grant only to nonprofits that are selected as an advisee and complete at least one successful capacity building project.

SVP Dallas works to build trust and establish true partnerships with nonprofits, working alongside nonprofits to improve their ability to deliver effective programs and fulfill their mission. For Advisees, we seek organizations that can benefit from and are willing to embrace a partnership that includes hands-on involvement by SVP Dallas Partners, regular self-reflection, and measurement of results.

Partners offer volunteer assistance in areas such as:

- Strategic & Business Planning
- Executive Coaching
- Leadership Development
- Governance & Board Development
- Financial Management
- Marketing
- Development
- Technology Infrastructure
- Operational Reviews



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Advisee Application

SVP Dallas has always focused on at-risk children and education for under-served population issues in North Texas, two areas of interest to our Partners. While these are broad focus areas, examples of outcomes/areas SVP Dallas has participated in previously include:

- Children's literacy
- High school graduation rates
- College/career readiness for economically disadvantaged youth
- Pre-K readiness
- English language proficiency
- Early childhood education
- Science, technology, engineering and math education (STEM)
- Children's access to health care
- Quality afterschool care/childcare for disadvantaged children
- Support for families dealing with homelessness and/or food insecurity

Guiding Principles

SVP believes we have the greatest opportunity for impact working with organizations that have:

- A shared understanding of the importance of building internal organizational capacity in order to achieve their mission;
- A clearly articulated mission for the organization's programs and infrastructure;
- Strong, stable and committed leadership ;
- The internal capacity (staff, board & financial resources) to embrace an SVP partnership, which includes regular self-assessment and working with volunteers;
- A track record of successful collaboration and/or partnership, indicating the organization's ability to embrace and benefit from SVP's mentorship and other in-kind services, as well as SVP's financial support;
- The desire to expand, replicate or otherwise leverage success based on proven results to increase community impact;
- Specific internal organizational challenges that currently prevent achievement of their full potential.



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Advisee Application

Eligibility Criteria

Nonprofit organizations that apply must meet the following basic eligibility criteria:

- A registered 501(c)3 tax-exempt organization in good standing with the IRS.
- Program focus on at-risk children and/or education for under-served populations in North Texas.
- Strategic capacity-building needs that would fit with our pro-bono consulting and giving model, and local staff who can utilize our volunteering and mentoring resources on those initiatives.
- A faith-supported organization will be considered as long as its programming contains no sectarian components or intent (including programs that include or require specific religious texts as part of the curriculum or are intended to advance a particular set of religious beliefs).
- Additionally, the following are guidelines for the “sweet spot” of organizations that we work well with, including:
 - Have been in operation for at least 2 years.
 - Have at least two full-time staff (or FTE) with stability within the key leadership of the organization.
 - Have local leadership/ED that has been in place a year.
 - Have a board with at least 3 active members.
 - Have a budget of at least \$200,000, and less than \$3,000,000.
 - Are at a critical juncture or inflection point in the organization’s growth or development.
 - Because our partnership will include hands-on mentorship and volunteering, we prefer that organizations be headquartered in North Texas so we can have access to key leadership and staff.

We will not accept applications from individuals or organizations that discriminate on the basis of race, religion, gender, sexual orientation, or national origin. We will not entertain requests from religious organizations for sectarian purposes (including programs that include or require specific religious texts as part of their curriculum), sports teams, and political or lobbying organizations, nor will we consider applications for sponsorships, auctions or fundraising events, endowment funds, capital campaigns, litigation or legal expenses.

Key Dates

Action is taken on a rolling basis. Once your Advisee Application is received, you will be notified about next steps and relevant dates, where applicable.

March 8, 2016 – Applications due by 5 pm

March 22, 2016 – Site visits begin

Week of April 25, 2016 – Advisee(s) selected and notified

Check SVP Dallas website for updates on the schedule for future application cycles.



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Advisee Application

Application Process

To be considered for *pro bono* services, a nonprofit organization must submit the following application.

Instructions

Your application will be held in the strictest confidence, so please be completely candid in your responses. Direct, specific explanations will help us understand how SVP Dallas may be able to add value to your organization.

There are three parts to the application:

1. Fact Sheet
2. Application Narrative
3. Attachments

Please answer the questions in the same order as this outline. If a question does not apply, feel free to mark “N/A.” The Fact Sheet and Application Narrative should not exceed three (3) pages. Longer applications will not be considered. Please use 1-inch margins, and no less than 11-point font. Please submit everything in PDF format.

Submission Details

Applications must be emailed to DoGoodBetter@svpdallas.org. No hard copy applications will be accepted.

Contact Information

Social Venture Partners Dallas
Donovan Ervin, Director of Strategy and Capacity Building
DoGoodBetter@svpdallas.org
214-855-5520



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Advisee Application

Application

Part 1: Fact Sheet

A. Organizational Information

- 1) Name of Organization and Website address
- 2) Name, Title, and Contact Information for executive officer (Phone and Email)
- 3) Length of tenure for executive officer
- 4) Year 501(C)(3) status awarded
- 5) Number of full-time equivalent staff (excludes volunteers)
- 6) Number of volunteers
- 7) Expected Revenue and Expenses in current fiscal year, date the fiscal year ends
- 8) % of funding from various sources including: government entities, grants, individual donors, program fees, events, and in-kind.

Part 2: Narrative

- A. Organizational Overview** *We are interested in clearly understanding what you do, how you do it, and the support structure behind your efforts.*

Mission & Vision

- 1) What is your organization's mission? Briefly describe your vision and/or goals.

Programs and Target Audiences

- 2) Provide a summary of your key programs. What opportunities, issues or needs are you trying to address?
- 3) Whom do you serve? Describe the size and characteristics of the constituencies or target audiences you impact.
- 4) What makes your organization distinct and stand out from the crowd?

Measuring & Leveraging Results

- 5) How do you measure your impact? What is success? Please describe your current methods of evaluation and the most important measurable outcomes you track. (In Part 3 you have the option of including sample outcomes.)
- 6) What have been your top achievements to date against those metrics? What are the organization's targeted results/goals for the future?



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B. Vision for SVP Relationship & Capacity Building *Your responses in this section are important for us to gain a better understanding of how SVP pro-bono consulting could be used to support your efforts to grow, evolve and strengthen your organization. This is an essential element of our decision-making process. Your application will be held in the strictest confidence, so please be completely candid in your responses. Direct, specific explanations will help us understand how SVP may be able to add value to your organization.*

Challenges and Risks

- 7) What keeps you up at night? What are the key challenges you face in realizing your organization's long-term goals? How do you plan to address them and over what time frame?

Capacity Building Needs

- 8) What will you need to strengthen or develop in the organization in order to achieve your mission and long-term vision? Given the type of projects outlined above, what is the one top capacity building need or opportunity you would like SVP to work on initially?

How you Envision Social Venture Partners Helping

- 9) If you are selected as an Advisee, based on SVP's capacity building approach, in what concrete way do you hope your organizations will be different about a year from now?

Part 3: Attachments – these do not count toward the three-page limit

1. (Required) **Tax Exemption:** The organization's IRS determination letter.
2. (Required) **List of Board of Directors:** names, roles and tenures;
(contact information not necessary)
3. (Optional) **Long-Term Outcome Metrics** (one page maximum)