

### **Option A) Top 10 Donors & Competitive Analysis: \$350**

Purpose: The basic information of which donors are giving funds within your sector *and* which organizations are receiving those funds. Knowing which donors are available will help your organization potentially apply for funding from said donors. Understanding which other organizations your organization is in 'competition' with for the same funds will bring your attention to: 1) chances of receiving funds, 2) if your programming is niche or not, 3) potential programmatic partnerships, etc.

#### What you get:

- Data on which donors are giving to what specific sectors, and sub-sectors, related to your organization's focus. Data is from the last two years or the most recent available (whichever is most relevant/current).
  - Donor Data includes:
    - Donor's name
    - How much the donors recently gave in a specific sector
    - Donors that are currently accepting proposals (\*)
  - Competitive Analysis includes:
    - Organizations that have received funding from specific donors
- Access to Top Donor Analysis spreadsheet template and final project research (Excel)
- Thirty-minute conference call to review data, and possible recommendations for next-steps.
  - Note: spreadsheet to include up to four (4) sub-/sector criteria (agreed upon with client); anything more will be charged at \$70/hour rate.

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### **Option B) Complete Competitive Analysis: \$1,700**

Purpose: Knowing which organizations are receiving funding that could potentially be your funds. A more robust analysis from Option A. Useful information for potential partnerships with like organizations, research evidence to guide the level of nicheness of your organization to vie for same funds, if your organization's mission is redundant, etc. Data is from the last two (2) years or most recent available.

#### What you get:

- Information included in analysis (example)\*:
  - Organization's name, website, mission statement, board of directors, location (HQ and programmatic), target demographic/s, major donors, annual budget, organization's ratings
  - Competition list, breakdown of their donors, when funded, and amount received.
  - Matrix comparing how many donors fund the same organizations and in what years.
  - Total amount received for each competition organization (year).
- Delivery product: Final spreadsheet with data plus document of key findings, trends and analysis.
- Access to Competitive Analysis spreadsheet template and final product (Excel).
- One-hour conference call to review data and potential recommendations for next-steps.
  - Note: information to *only* include five (5) organizations. These organizations will be agreed upon before project is conducted by consultant. Additional organizations can be added and charged at \$70/hour rate.

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### **Option C) Donor Contacts: \$300**

Purpose: For such donors (e.g. foundations) that do *not* have an open/closed time frame to apply for funding, organizations need to be *invited* to submit a proposal. A list of names and contact details of people at such donors is an easy way to connect with donor staff in order to (potentially) be invited to apply for funding.

#### What you get:

- Analysis and list of suitable people at specific donors that would be good to reach out to.
  - Client to identify up to 20 donors for consultant.
- Spreadsheet breakdown of donors, donor's contact/s, their contact details and LI profile link, and notes on each contact.
- Cold-email Template and LinkedIn Cold-Invitation Template to use as a guide to initiate communication with each contact.
- Thirty-minute conference call to review materials and recommendations for next-steps.
  - Notes:
    - Client provides names of donors to be researched. If no donors are known, I suggest purchasing Option A before this service.
    - All information will be obtain legally using Foundation Director Online (FDO), social media (e.g. LinkedIn), Google, etc. Nothing shady.
    - Names of people to contact should not be a problem to research. No guarantee of how many people's contact details (e.g. email addresses) I can find. If only names can be found, LinkedIn invitation message templates will be available.
      - Average is two (2) people per donor; will provide up to four (4) contacts per donor.
    - Additional work to be conducted at \$70/hour rate.

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### **Option D) Donor Master List Template: \$175**

Purpose: A spreadsheet to track when certain donors open and close their proposal submissions (dates) to non-profits. Spreadsheet is designed to be intuitive so anyone can use it with ease.

#### What you get:

- Gantt chart-style Excel spreadsheet; time (months and quarters) on columns and rows available to input names of each donor.
  - Template can be altered per your non-profit's fiscal or regular calendar year.
  - Chart includes color-coded key to designate dates on timeline.
- Twenty-minute conference call to explain how to use template and to answer any questions.

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### **Option E) Donor Master List Spreadsheet: \$350**

Purpose: Tracking when certain donors have their proposal submission dates (open and closed) – all in one location. In addition, timeline to include when to start planning and draft due dates. This is Option D *plus* the spreadsheet data filled-in.

What you get:

- Option D's template plus moderate spreadsheet alterations per client's needs.
- Spreadsheet completed (to the best of consultant's ability), including:
  - Open and closed submission dates
  - When to start planning for proposals, and when internal first and second proposals drafts should be due (suggested).
  - Can be formatted/uploaded into a Google Sheet for real-time and multi-stakeholder accessibility (optional).
- Thirty-minutes of time allotted for research for information not received from client
  - Notes:
    - I will complete the spreadsheet for up to 20 donors with only donor names given by the client; anything more I will charge \$70/hour rate.
    - Timeframe included is only 14-months; anything more I can add a rate of \$70/hour

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**Option F: Win-Loss Database Template: \$250**

Purpose: It's in an organization's best interest, and administratively responsible, to track and keep record of proposals/donors wins and losses. Doing so will facilitate learning and strategic thinking across the organization. Furthermore, this spreadsheet could enable further grant proposal writing analysis in addition to supporting relationship management and cultivation between organization and donors.

Spreadsheet to tracks when your organization applied to specific donors/grants, and when to apply again.

Can be formatted/uploaded into Google Sheets for real-time and multi-stakeholder accessibility (optional).

What you get:

- Spreadsheet template contains three (separate but connected) tabs:
  - 1) Donor name, donor contacts, contact position, and communication details (similar to Option C).
  - 2) Proposal/grant applied and rejected/awarded dates, grant sectors, reapply dates.
  - 3) Best practices, lessons learned and notes on the application process, feedback from donors, dates to apply again.
- Thirty-minute conference call with client to discuss the template structure and use, and to answer any questions.
  - Notes:
    - This Option is catered to only provide the spreadsheet template as the non-profit would have all of the information to fill-in the information. If clients need support to complete the spreadsheet, I am more than happy to work with you at my \$70/hour rate.