



Your Mission is Our Mission. Our Team is Your Team.

FUNDRAISING DIAGNOSTIC

Objective: To provide a clear picture of your organization's internal capacity and external positioning, and identify optimal areas for growth through analysis of marketing collateral, funder and donation data, landscape analysis, and interviews with key stakeholders. Black Fox Philanthropy includes interviews of both current funders and board members in this process, both to inform the diagnostic and future strategy, as well as potentially deepen the emotional and financial engagement with your organization.

Deliverable: Data Analysis

The Black Fox Philanthropy team will take a deep dive into your donor data to perform analysis of your current funding mix, size of gifts, donor attrition, and geographical concentrations. Further, Black Fox Philanthropy will assess the quality and viability of 500 select funders in your database (for example: have given gifts of \$1,000 or more) with a high level wealth screening layer (additional blocks of 500 can be added at a rate of \$750). This comprehensive look at your data will highlight your organization's funding strengths and opportunities, pointing to where to concentrate efforts. The analysis will also reveal potential weaknesses in revenue streams that need to be addressed in a fundraising strategy.

After performing analysis of your donor and donation data, Black Fox Philanthropy will also conduct secondary interviews with staff involved in fundraising to further uncover fundraising pain points, and understand the context behind answers given in response to the data request.

Note: Black Fox Philanthropy takes confidentiality seriously; your data will not be shared with any external parties. We are also happy to sign a non-disclosure agreement upon request.

Deliverable: Staff Fundraising Skills Inventory

Black Fox will profile fundraising staff to determine comfort and self-rating of abilities across a range of key fundraising-related skills. The assessment will not only address skill sets, but also rate interest in the fundraising tasks and roles as a vehicle for potential

professional development. In addition, we will assess bandwidth for each staff member to optimize their contribution. We will present the results in a format that will allow you to see which skills are well-represented by the existing team, which skills should be sought out through a third-party contractor or secured in future hires, and which responsibilities should be reallocated.

Deliverable: Landscape Analysis

Black Fox will perform benchmarking analysis to determine the structure, size and revenue mix of your peer organizations to give your organization a solid sense of your current position in the marketplace, and best practices to do with both Foundation/Corporate fundraising and Individual funders, including Major Gifts. This step also reveals key funders who are active in your issue area, geography, and beyond.

Deliverable: Landscape Analysis - Development Department Infrastructure

Black Fox Philanthropy will provide a snapshot of the development staffing of organizations of similar size and scope of your organization, and organizations that are somewhat larger in size and scope - helping to inform an optimal staffing infrastructure for your organization in 2018 and beyond.

Deliverable: Marketing Audit

Black Fox will perform an audit of your existing marketing materials, including any existing case for support documents, website, social media, donor communications pieces (both printed and electronic) and donor stewardship materials. We will produce a report that compares your current materials with industry best practices for fundraising marketing and make funder-centric content and style suggestions as it relates to best practices and optimal positioning.

Deliverable: Funder Interviews | Individual and Institutional Funders

Black Fox Philanthropy will work with you to identify four (4) important funders who are willing to share insights about their relationship to your organization. Note: Black Fox Philanthropy ideally profiles existing funders who have capacity to give more significantly to gain key insights that will inform strategy, and also gain knowledge around what would increase their engagement in the short and long-term. If Black Fox Philanthropy is also creating the Major Gifts strategy then funder calls will be tailored to assessing potential engagement as a program committee member or funder.

These funders will be profiled by Black Fox Philanthropy's Founder Natalie Lynn Rekstad, a philanthropist in her own right, which often enables deeper-dive peer-to-peer conversations. The resulting interviews are typically quite candid, providing insights that are vital to understanding what compels funders to support to your organization, and potential for deeper engagement. We will produce a report covering general themes

from the funder interviews, and specific information that is vital to strategy. These insights will inform not only strategy but a variety of processes, including messaging, solicitation, and stewardship toward greater short-and long term giving and engagement.

Deliverable: Board Interviews & Survey

Black Fox Philanthropy will hold a 30-minute interviews with two (2) of your board members via phone or videoconference. A Survey Monkey will be prepared to survey all board members to assess their fundraising comfort and skill, and ways in which they identify as fundraisers (Asker, Nurturer, Connector). The survey will also capture data points around board culture and expectations around fundraising. These candid conversations and the survey results are designed to assess and increase board engagement around fundraising and to inform the fundraising diagnostic and future strategy. A report will be produced covering general themes from the board member interviews and surveys, and any specific information that is vital to strategy.

Deliverable: Diagnostic Presentation

Black Fox Philanthropy will present the deep dive analysis of your organization in Prezi format, and will include all supporting documents such as the marketing audit, board profile, and staffing skills assessment/capacity. We will incorporate insights gained from our landscape analysis and interviews with funders and board members. Based upon all of these data points, Black Fox Philanthropy will prepare a diagnostic presentation that summarizes your fundraising capacity, strengths, challenges and opportunities, all of which informs strategy for optimal revenue streams for short and long-term growth. Further, upon request Black Fox Philanthropy can create an Executive Summary version for your board, and is available to present to the board via videoconference should that be of interest. This is often leveraged in making a persuasive case to the board to support proposed fundraising initiatives and investments.

Time and Financial Investment: 8-12 weeks, \$10,000

Optional Add on: \$750 per 500 to screen more names in your database to assess quality and viability of potential funders.

Client Testimonial: "Black Fox's development diagnostic gave us a thorough and clear assessment of our current fundraising strengths and opportunities. Not only are their recommendations highly actionable, but their findings were so valuable that we've shared them with our Board and staff, from marketing to operations to build common understanding for greater teamwork. We now have a more efficient pathway ahead of us to build more robust resources and relationships to realize our ambitious goals. The Black Fox team was swift, supportive, and applied their deep expertise in a thoughtful

and customized way. We knew they were in our corner 100% throughout the entire process."

-Jensine Larsen, CEO & Founder, World Pulse

About Black Fox Philanthropy: Black Fox Philanthropy is a fundraising strategy firm with a focus upon serving International NGOs. Our mission is to mobilize significant resources to help solve complex problems on a global scale. Black Fox Philanthropy is proud to be a Colorado-based company that is both woman-owned and a certified B Corporation. Learn more at www.blackfoxphilanthropy.com.

WORK OUTSIDE OF SCOPE

This engagement includes the scope of work described above. We understand that during a consulting engagement, items outside the original scope of work may emerge and our clients may want us to direct time and attention to those items. Should we encounter items of this nature, and/or upon our client's request, we will prepare an addendum to this agreement with a description of the additional work, an estimate of hours required to complete the additional work and a cost estimate, at our standard \$250/hour rate.