Team Size:
Typically 4-10 team members, including 1 project manager

Individual Member Commitment:
3-10 hours/week, depending on project scope

Project Duration:
3 weeks to 6 months, depending on project scope

Project Structure:
Mostly remote participation with weekly virtual check-in meetings. In-person meetings are typically incorporated into the process at key project milestones.

Financial Management

Financial Systems Assessment (2-4 months)
Review an organization’s financial management systems, identify challenges and better serve the vide recommendations on new processes or vendors that would better serve the organization

Investment Strategy and Review (2-4 months)
Provide an organization with insight on what individual investors look for in a venture and make recommendations for how to “package” an organization’s services to potential donors

External Scan Project (2-4 months)
Assess the benefits and drawbacks of entering into a new market by analyzing the marketplace and providing the nonprofit with recommendations on pursuing the venture

Cost Benefit Analysis Project (3-4 months)
Quantify the costs and benefits of a strategic decision such as determining the next city for organizational growth, defining the most cost-effective fundraising strategy, or undertaking a building project

Financial Modeling Project (3-4 months)
Produce an interactive financial model that analyzes the true costs of running an existing program or launching a new service, to help the nonprofit make future decision on program pricing, cost, and scale
Operations

Information Mapping Project (6-10 weeks)
Diagram and document methods for tracking and managing information across an organization, using flow charts, documentation from the nonprofit, and job descriptions

Program Delivery Optimization Project (2-4 months)
Create a process map and analyze ways to generate greater efficiency across multiple programs and services

Client and Crisis Relationship Training (6-10 weeks)
Train new client managers or call center employees on how to build trust in client relationships, deescalate crisis-level conversations, and produce high quality client care with minimal time

Strategy

Strategic Plan Development (4 months)
Develop or update a strategic plan for the organization, including conducting an environmental scan/market analysis, facilitation of organizational goals and priorities and documentation of operational plan to achieve these goals

Partial Business Plan Development (6-8 weeks)
Develop one portion of a business plan for a specific program or initiative. Possibilities include: 1) conducting financial analysis and projections; 2) developing the operational, marketing, or HR considerations for the plan, or 3) creating benchmarks for successful implementation of the program or initiative

Full Business Plan Development (4 months)
Develop a full business plan for a specific program or initiative, including conducting financial analysis and projections, and identifying the operational, marketing, and HR considerations and benchmarks for successful implementation

Human Resources

Benefits and Compensation Review Project (6 weeks)
Conduct research to determine average salaries and benefits offered by similar nonprofits and present findings to nonprofit executives that details existing average salaries, how they compare, and changes they should consider making

Performance Review Development Project (6-10 weeks)
Revamp the annual performance review process for employees of the nonprofit organization, including defining an annual goal-setting and performance review process hiring a new employee

Recruiting and Hiring Process Project (6 weeks)
Work with key nonprofit staff to craft a job description and write interview questions the organization can use when hiring a new employee
Personnel Policy Development Project (3-4 months)
Create an employee handbook for the organization with detailed documentation about personnel policies. Please note: the members of the team must have significant experience in employment law

Succession Plan (3-4 months)
Work with nonprofit leadership and Board of Directors to develop a strategic roadmap for a nonprofit leadership transition, which will ensure leadership continuity and retain and develop knowledge capital and relationships for the future

Marketing

Collateral Assessment (6-10 weeks)
Analyze existing collateral for consistency of look, feel, and messaging consistency and provide recommendations to create greater alignment across the marketing portfolio

Brand Attributes Guide Project (2-4 months)
Define and document a nonprofit’s brand attributes such as target audiences, audience characteristics and attributes, and communications tone

Collateral Development Project (2-4 months)
Revamp marketing collateral to create a visually appealing and consistent message. Examples of such projects include: brochures, annual reports, e-newsletters, or a website

Digital Communications Plan (2-4 months)
Craft an integrated digital communications plan (may include website, social media, email or other online channels and platforms) and key recommendations for an organization, focusing on bringing together consistent content approach, design, and user experience

Market Research Project (2-4 months)
Conduct a peer (competitive) analysis, focus groups and/or interviews to help a nonprofit understand and define their positioning in the marketplace

Sales

Sales Forecasting (2-4 months)
Create structure around a nonprofit’s charitable contributions or earned income revenue stream by categorizing the different stages of the sales process, assigning metrics and forecasting tools to each stage, and coaching internal stakeholders on how to translate ambiguous conversations into tangible forecasting
Defining an Organizational “Pitch” (3-4 months)
Craft a foundational messaging platform (positioning statement, tagline, and key messages) and then tweak that messaging platform to target the different, unique audiences of the nonprofit organization. Once that messaging is defined, outline the metrics that support each set of messages and train key internal stakeholders to use the new messaging.

Product Creation (6 weeks to 4 months)
Support a nonprofit in developing product as part of an earned income revenue strategy. Project could include conceptualizing product, identifying key audiences, crafting packaging (i.e. messaging, pricing, etc.) and a bring-to-market strategy.

Technology

Database Assessment (6-8 weeks)
Assess the use and architecture of a database system and provide recommendations for changes that would streamline operations and the end user experience.

Website Assessment (6-8 weeks)
Analyze an organization’s website and document recommendations for ways in which the visual design, architecture and layout would better achieve the organization’s goals.

Vendor Selection (6-8 weeks)
Develop requirements for a new technology vendor (e.g. CRM, website CMS, Cloud-based intranet, etc.), guide the organization through the selection process.

Network Assessment (6-8 weeks)
Assess an organization’s current network infrastructure and develop recommendations to improve security and/or networking capability.

Database Development Project (4-6 months)
Develop a database that manages program participants, improves fundraising efficiency, or generates statistics for funders.

Website Development Project (4-6 months)
Add new functionality to an existing website, or create a brand new site, that helps a nonprofit engages its key constituents more effectively.

Networking & Security Implementation Project (4-6 months)
Develop a network that protects files against intruders, connects multiple offices to the same central file system, or builds networking infrastructure that facilitates office expansion.

IT Infrastructure Assessment & Strategic Plan (4-6 months)
Assess all elements of IT Infrastructure, develop recommendations for infrastructure improvements to support operations and craft a 3-5 year strategic IT investment and implementation plan.
**Data & Analytics**

**Data Assessment (2 – 4 months)**

Collect and analyze a nonprofit’s data to help drive decision making on key strategy and initiatives, increase engagement among constituents, report on program impact and generate insights about the behavioral patterns of their base.

**Data Visualization | Infographic (6 weeks - 2 months)**

Transform a nonprofit’s current data into a dashboard-level visualization for organizational leadership, funders and other constituents to clearly understand and engage with its progress and metrics of success.

**Predictive Modeling (2 - 4 months)**

Collect, collate and centralize data for a specific program of initiative such as fundraising. Create and implement a utilization plan that will help a nonprofit understand who they should be targeting, resulting in increased donations.

**Data Tool Selection and Implementation (2 - 4 months)**

Understand what tools are being used to gather qualitative data to help a nonprofit evaluate the success of its programming. Research, design and launch a set of tools that will collect quantitative and qualitative data to help a nonprofit understand their impact and tell their story.