



Collaborative Group

Philanthropy • Strategy • Leadership

Strategic Philanthropy Proposal

Community-Based Nonprofit

Strategic Philanthropy & Revenue Diversification Initiative

Background

The organization has built a strong and respected nonprofit supported by memberships, sponsorships, events, grants, and strategic partnerships. As the organization looks toward the future, leadership has identified an opportunity to strengthen philanthropic support, diversify revenue, and create a more sustainable fundraising model that complements its existing revenue streams.

With the anticipated conclusion of a significant funding source in 2027, along with opportunities to expand impact through leadership development, workforce initiatives, advocacy, and sector advancement, this is an ideal time to evaluate the organization's fundraising infrastructure, philanthropic potential, and long-term sustainability strategy.

Project Purpose

The purpose of this engagement is to help the organization assess its current fundraising environment, clarify its philanthropic value proposition, and develop a strategic roadmap for long-term revenue diversification and growth.

Rather than beginning with a campaign, this process will focus on creating the conditions necessary for sustainable philanthropic success by strengthening infrastructure, identifying opportunities, and aligning leadership around a shared vision for growth.

Scope of Work

Discovery & Assessment

Revenue & Fundraising Review

- Review current revenue streams and funding trends
- Assess existing fundraising activities and philanthropic performance
- Evaluate opportunities for revenue diversification and growth

- Identify potential risks and opportunities related to future funding needs

Fundraising Capacity Assessment

- Review development structure, staffing, and responsibilities
- Assess fundraising systems, processes, and accountability
- Evaluate donor stewardship and relationship management practices
- Review current donor database utilization and reporting capabilities
- Identify opportunities to strengthen fundraising operations and infrastructure

Board & Stakeholder Assessment

- Assess board readiness for philanthropic engagement
- Explore leadership perceptions related to philanthropy and fundraising
- Identify opportunities for ambassador, cultivation, stewardship, and fundraising roles
- Evaluate alignment between organizational priorities and philanthropic opportunities

Value Proposition & Case for Support Review

- Evaluate existing messaging and positioning
- Clarify the organization's unique value and impact
- Identify themes that resonate with philanthropic audiences beyond traditional industry stakeholders
- Develop recommendations for strengthening the organization's philanthropic narrative

Strategic Recommendations

Revenue Diversification Strategy

- Identify philanthropic growth opportunities
- Evaluate donor audience segments and engagement strategies
- Recommend priorities for individual, corporate, foundation, and community engagement
- Identify opportunities to leverage existing events, partnerships, and stakeholder relationships

Philanthropy Growth Roadmap

- Define short-term and long-term priorities
- Identify infrastructure investments needed to support growth
- Recommend Board and leadership engagement strategies
- Establish a framework for increasing contributed income over time
- Identify key milestones and measures of success

Campaign Readiness Considerations

- Assess readiness for future campaign activity
- Identify prerequisites for campaign success
- Recommend timing, structure, and next steps for future fundraising initiatives

Deliverables

At the conclusion of the engagement, The Collaborative Group will provide:

- Philanthropy Growth & Revenue Diversification Assessment
- Revenue Diversification Recommendations
- Value Proposition & Case for Support Recommendations
- Board & Stakeholder Engagement Recommendations
- Philanthropy Growth Roadmap
- Campaign Readiness Recommendations

Looking Ahead

The purpose of this engagement is to help the organization establish a strong foundation for long-term philanthropic growth and sustainability. Through this process, the organization will gain a clearer understanding of its fundraising strengths, opportunities, organizational readiness, and the conditions necessary for future philanthropic success.

Recommendations resulting from this engagement may include opportunities related to campaign planning, board engagement, donor cultivation, alumni engagement, fundraising infrastructure, stewardship systems, and other strategic initiatives designed to support long-term revenue growth. Any future work would be scoped separately based on organizational priorities and readiness.

Investment

Fixed Fee: \$xxxxxxx

Timeline: Approximately 8–10 weeks

This fee includes discovery, assessment, stakeholder conversations, analysis, recommendations, and a presentation of findings and recommendations to leadership and key stakeholders.

Expected Outcomes

Through this process, the organization will gain:

- A clearer philanthropic vision and value proposition
- Greater understanding of fundraising strengths and gaps
- A roadmap for revenue diversification and long-term sustainability
- Recommendations for strengthening fundraising infrastructure and capacity
- Increased clarity regarding board and stakeholder engagement

- A strategic framework for future philanthropic growth and campaign planning

Closing Thoughts

This organization has built a strong foundation and earned the trust of those it serves. As it looks toward its next chapter, this engagement is designed to help leadership and the board strengthen long-term sustainability, deepen stakeholder engagement, and build a philanthropic framework that supports future growth.

By taking the time to assess current capacity, clarify priorities, and align around a shared vision, the organization will be better positioned to expand its impact, diversify revenue, and pursue future fundraising opportunities with confidence and purpose.

Contact Information

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