

PHILANTHROPIC INTERMEDIARY SERVICES REQUEST FORM

Date: _____ Nonprofit: _____ Program: _____ Grant \$: _____

Grantor: _____ Contact Name: _____ Phone: _____ Email: _____

Grantee: _____ Contact Name: _____ Phone: _____ Email: _____

Please Check Here if This Request is Covered by an Umbrella Grant: ☐

SERVICES

Note ALL services include access to trainings, board orientations, fundraising software, peer convening/collaboration, & a la carte services discount.

| <u>% PAID BY</u> <u>GRANTOR</u> (In Addition to Grant) | <u>DEDUCT %</u> <u>FROM GRANT</u> | <u>SPLIT</u> (Donor & Nonprofit) |
|--|--------------------------------------|--|
|--|--------------------------------------|--|

GRANT OVERSIGHT

FEE: 1.5% (FEE MINIMUM OF \$100, MAX CAPPED AT \$10K PER GRANT ANNUALLY)

☐☐☐

Complete grant oversight including at least one program visit/review, assistance with real outcomes (not just # of participants, etc.), final review and outcomes/recommendations provided at completion.

*GRANT OVERSIGHT + ORGANIZATIONAL CAPACITY ASSESSMENT

FEE: 2.5% (FEE MINIMUM OF \$225, MAX CAPPED AT \$15K PER GRANT ANNUALLY)

☐☐☐

Grant oversight described above, plus a full organizational capacity assessment with recommendations to increase efficiency and effectiveness. This is especially helpful for a new nonprofit partner, a nonprofit requesting funds to start or expand a program (to ensure they have the capacity to be successful), or a nonprofit in transition or crisis.

*GRANT OVERSIGHT + ORGANIZATIONAL CAPACITY ASSESSMENT + CONSULTING

FEE: 5% (FEE MINIMUM OF \$350, CAPPED AT \$20K PER GRANT ANNUALLY)

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Grant oversight and organizational capacity assessment described above, plus a plan for improving the overall capacity of the nonprofit, program outcomes, etc. Once the plan is complete, consulting will be provided to help in areas of need. Follow-up will also be provided at predicted milestones.

A LA CARTE SERVICES

FEE: NEGOTIABLE BASED ON SERVICES REQUIRED

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À la carte assessments for both programs and organizations, plus consulting services are available either individually, or in addition to your plan chosen above. For example, if a nonprofit is transitioning leadership, in a crisis, considering a merger, etc. Or if your grant is under \$10k and you would like additional services added to grant oversight, it can be added and the fee negotiated.

* Only available on grants \$10k and above

USE NEXT PAGE(S) TO DETAIL WHAT SERVICES YOU REQUIRE. OR CONTACT OUR DONOR SUPPORT PROFESSIONALS AT 000-000-0000.

PAGE 2

Date: _____ Grantor: _____ Grantee: _____ Program: _____

BACKGROUND

Is This the First Time You Have Funded This Organization? [] YES [] NO

Is This the First Time You Have Funded This Program? [] YES [] NO

Please check the box of any specific services you would like implemented during this grant. At the bottom please note any concerns or requests not listed. You can also contact use directly for discussions on how we can best help you implement your grant successfully.

All work done by our organization on your behalf will be documented and sent to you directly. Unless you request otherwise, we will also provide our constructive work to the nonprofit as well.

GRANT OVERSIGHT

- ☐ In Person Program Review
- ☐ End of Grant Evaluation
- ☐ Outcomes Assessment

ORGANIZATIONAL CAPACITY ASSESSMENT

- ☐ Organizational Assessment with Recommendations for Improvement (Good for new nonprofit partner, nonprofit growing quickly or experiencing major changes)
- ☐ Program Capacity Review (Ensures nonprofit has the capacity for a new grant, new program or expanding program)

CONSULTING

- ☐ Organizational growth plan, milestones and follow-up based on organizational and program assessments.
- ☐ Leadership Support and Training (Helpful to all nonprofits, especially with a new CEO or in transition)
- ☐ Sustainability Plan, Milestones and Follow-up (Excellent for nonprofits funded for a specified time only)

A LA CARTE SERVICES

(Please note any concerns or services you request in relation to this grant, or contact our office directly to develop services specific to the needs of both you and your grantee.)
