

2024



YDI...WGI!

YOU DREAM IT...WE GRANT IT!

Service Catalogue

SERVICE PACKAGES & PRICING

"The future belongs to those who believe in the beauty of their dreams!"
~Eleanor Roosevelt





Welcome!

Welcome to You Dream it...We Grant it! I am absolutely elated that you're taking this first step towards empowering your organization for your desired success. As you explore this service catalogue, I hope you'll gain a comprehensive understanding of how our services can be your catalyst for your sustained growth and achievement.

We offer tailored, financially feasible service packages. Please note that we also provide a customizable option, allowing you to create a package focused on your current needs, without unnecessary services.

Kristin Dominique 

You Dream it! ...We Grant it!



267-978-1599

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T A B L E O F C O N T E N T S

YOU DREAM IT... WE GRANT IT! | SERVICE & PRICING CATALOGUE

MEET OUR FOUNDER 04

This brief introduction to our founder/CEO- Kristin Dominique aims to provide insight and understanding of the fuel and passion that empower *You Dream it... We GRANT it!*

OUR PROCESS 05

This section outlines our five-step process to initiate services, starting with an initial consultation to understand your needs. We'll then provide a customized service proposal tailored to your goals. The agreement and onboarding process ensures a smooth setup, followed by ongoing service delivery and regular reviews to optimize your experience.

NONPROFIT ORGANIZATION SERVICE OUTLINE 06

Our nonprofit service outline showcases our specialized support, including grant research and writing to secure funding. We offer customized packages designed to help your nonprofit achieve optimal operations and enhance its funding eligibility.

SMALL BUSINESSES SERVICE OUTLINE 19

This section showcases our small business services, ranging from initial licensing to government contract bidding. Our tailored service packaging provides comprehensive service options to meet your current small business needs.

THANK YOU! 29

MEET OUR FOUNDER

KRISTIN DOMINIQUE



Kristin Fulton is the visionary founder of You Dream It...We Grant It! (YDI...WGI), a mission-driven consulting firm born from her passion for empowering underserved communities and her commitment to social justice. Leveraging her natural talents in creative writing and public speaking, along with her extensive corporate experience in healthcare administration, Kristin established YDI...WGI as a catalyst for change.

Through her journey of self-discovery, sparked by the COVID-19 pandemic, Kristin realized her purpose: to use her skills to help eradicate social, racial, and economic disparities in communities of color. With a deep understanding of the unique challenges these communities face, Kristin has dedicated herself to supporting the leaders and entrepreneurs who serve them.

YDI...WGI offers a comprehensive suite of services designed to bolster success in underserved communities. From grant writing and business planning to organizational development, program creation, and beyond, Kristin provides the tools and expertise her clients need to thrive. Her services include content editing, graphic design, marketing, and more – all tailored to support community-focused initiatives.

With over 15 years of experience and a lifelong commitment to the power of words and action, Kristin collaborates with her clients to secure the resources they need to achieve their missions. Through YDI...WGI, she is helping to create a more equitable future, one dream at a time.





Our Process



01 SCHEDULE YOUR CONSULT
 Schedule your free 30 minute consultation through our website. Through this consultation we will discuss how our service can potentially help meet your expressed organizational goals.

02 SELECT YOUR SERVICE PACKAGE
 Select the service offering that best meets your current need. Whether you select one of our tailored package offerings or elect to customize a package directly aligned to meet your expressed goal, our team of experts will assist you in choosing a service package that is most feasible and effective.

03 SERVICE AGREEMENT CONTACT DETAILS
 Thorough review of the service agreement is required prior to any payments or services being rendered. It is important for both the client and consultant to review and agree upon all terms and conditions outlined in the service contract.

04 PAY YOUR INVESTMENT
 All services require a 50% minimum deposit to initiate services. Your payment schedule will be outlined in your service agreement contract.

05 START YOUR JOURNEY
 Now we are ready to embark upon this collaborative journey of desired excellence!
LET'S TURN THOSE DREAMS INTO REALITIES!

COMMUNICATION

267-978-1599
 kfulton@youdreamitwegrantit.com
 Philadelphia, PA

WEBSITE
 www.youdreamitwegrantit.com

HOURS OF OPERATION
 T-Th 8:00am - 6:00pm EST
 M & F 9:00am - 4:00pm EST
 Saturday: By appointment ONLY
 Sunday: CLOSED



Nonprofit Organizations (501c3)

**COMPREHENSIVE
SERVICE PACKAGE
& PRICING
OUTLINE**



NONPROFIT SERVICES

At *You DREAM it...We GRANT it! (YDI...WGI)*, we understand the unique challenges and opportunities facing nonprofit organizations. Our team of experienced consultants is dedicated to helping nonprofits thrive through comprehensive services tailored to meet your organizational needs. From licensing and organizational development to grant writing and program evaluation, we provide the expertise and support you need to fulfill your mission.

Our services are designed to help you build a strong foundation, secure the funding you need, and deliver effective programs that make a difference. We take a personalized approach, working closely with you to understand your goals and develop strategies to achieve them.

Whether you're just starting out or looking to take your organization to the next level, we're here to support you every step of the way. Let us handle the behind-the-scenes work so you can focus on what matters most – maximizing your community impact!

Explore our detailed service packages below to learn how we can help your nonprofit succeed.

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ORGANIZATIONAL DEVELOPMENT

Our Organizational Development package is designed to help your nonprofit establish a solid foundation for long-term success. This comprehensive package includes:

- **Structuring Your Organization:** We'll guide you in setting up your nonprofit from the ground up, including defining your mission and vision, establishing a board of directors, and obtaining necessary licenses and tax-exempt status.
- **Program Development:** We'll work with you to create effective and efficient programs aligned with your mission and goals.
- **Staffing and Budgeting:** We'll provide expertise on hiring the right staff, creating a realistic budget, and developing a fundraising plan to sustain your organization.
- **Strategic Planning:** We'll facilitate a strategic planning process to help you set a clear direction and make decisions that support your mission.

With our Organizational Development package, you'll have the tools and guidance you need to build a strong, sustainable nonprofit. Let us help you lay the groundwork for success.



PACKAGE	SERVICES PROVIDED	TIME
<p>Bronze: <u>Nonprofit Foundation:</u></p> <ul style="list-style-type: none"> Ideal for new organizations (typically under 3 years old). This package ensures your full compliance with state and industry regulations. 	<ul style="list-style-type: none"> 501c3- Tax Exempt Status: Application Preparation and Submission (\$265 or \$625 3rd party cost) Mission, Purpose, and Value statement development Establishment of Board of Directors Creation of Bylaws and Policies Initial strategic Planning Organizational Budget Outline SWOT and Gap Analysis Reports 	3-6 weeks
<p>Silver: <u>Nonprofit Launch</u></p> <ul style="list-style-type: none"> Ideal for organizations seeking to establish themselves: understanding the target demographic, desiring impact and outcomes, and structuring the organization for optimal community impact. 	<p><i>Inclusive of everything provided in the Bronze Package, plus:</i></p> <ul style="list-style-type: none"> Program development and planning: Staffing plan, Recruitment assistance, and job description outline Organizational Itemized Budget Nonprofit Business Plan and Pitch Deck Fundraising Strategic Planning Grant Research and application submission 	6-12 Weeks
<p>Gold: <u>Nonprofit Growth/Rebranding</u></p> <ul style="list-style-type: none"> Ideal for established organizations seeking growth and greater impact. We'll analyze your current state and provide a detailed report outlining the best strategies to align your efforts with today's climate and resonate with your target demographic. 	<p><i>Inclusive of everything in our Silver package, plus:</i></p> <ul style="list-style-type: none"> Comprehensive Strategic planning and execution Professional Leadership Development Training Fundraising Strategies: marketing, benchmarks, and launch Capacity Building/Rebranding campaign launch 	3-6 months
<p>Platinum: <u>Nonprofit Accelerator</u></p> <ul style="list-style-type: none"> This expedited package option is ideal for organizations eager to quickly establish operations. It includes a 20% premium for expedited service. 	<p><i>These services include all services listed under our Bronze & Silver packages, plus:</i></p> <ul style="list-style-type: none"> Expedited service with priority turn-around-times Additional strategic planning and support sessions (virtual and in person meeting options available) Ongoing consulting for the first operable 6 months 	3-4 months

Service Package Contingencies

The contingencies outlined below offer important details about the services included in the Nonprofit Organizational Development Service Packages.

***Please note that third party fees are not included in our package pricing. It is the client's responsibility to pay all associated fees directly to the third-party vendors using their own banking account or credit card. YDI...WGI will not cover these costs on your behalf. ***

<p>➤ <u>Grant Writing Research and Application Submission</u></p> <ul style="list-style-type: none"> YDI...WGI can NOT guarantee any grant funding of any kind. We are fully committed to preparing and submitting well written proposals, as well as completing needed outreach to potential funders, ensuring optimal chances at being awarded the sought after grant. Client must provide all necessary information about the organization: see checklist – ensuring prompt turn-around-times and 	<p>➤ <u>Expedited Services</u></p> <ul style="list-style-type: none"> Expedited services are subject to availability and approval by YDI...WGI. Expedited services will be assessed a 20% service convenience fee- 20% of the listed service price. Expedited services must be paid in full up front- payment options are not available for expedited requests. <p>➤ <u>Assessments</u></p> <ul style="list-style-type: none"> Client must complete the tailored package assessment in its entirety. Failure to complete the assessment will delay the start of services.
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<ul style="list-style-type: none"> ▪ optimal proposals. . ▪ Client is responsible for reviewing and approving <u>all</u> grant applications before submission. Client may determine that YDI...WGI may submit applications without prior approval- this determination must be communicated in writing. ▪ A maximum of 3 grant application submissions are included with your package, additional grant applications can be added to your package selection at a discounted rate- the discounted rate is only applicable during the duration of the service agreement. ▪ Client must notify YDI...WGI of <u>all</u> grant approvals. 	<ul style="list-style-type: none"> ➤ Checklist <ul style="list-style-type: none"> ▪ Client must provide all items on the paired service package checklist. ▪ Failure to provide items on the checklist will delay the start of services. ➤ Exclusions <ul style="list-style-type: none"> ▪ Federal Grant applications are NOT included in any service package option. This service must be selected independently.
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<ul style="list-style-type: none"> ➤ Program Development <ul style="list-style-type: none"> ▪ Client must be instrumental in identifying and establishing the program goals and initiatives. ▪ A maximum of 3 programs are included in your service package: <ul style="list-style-type: none"> » Programs and Event structuring are synonymous under this service option. » One program funding option will be completed: this funding attempt is not part of the 3 organizational grants listed above. Funding options include: Grant, sponsorships, or fundraising campaigns. <p>Additional Programs: If you need additional program development support, please see our program development service option.</p>
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<ul style="list-style-type: none"> ➤ Missed deadlines >14 calendar days are subject to a pause in service: YDI...WGI reserves the right to adjust service agreement timelines based on failure to provide prompt supporting documentation, or failure to meet confirmed deadlines. <ul style="list-style-type: none"> » Paused service agreements are active for 180 calendar days- YDI...WGI will do our best to accommodate availability- reinstated service agreements require signed & dated amended contracts. » Failure to reinstate service agreement within 180 calendar days: a consulting credit (valid for an additional 180 days) will be issued. Reinstatement after this 6-month grace period incurs a \$250 fee. » Failure to reinstate services within one calendar year: If services are not reinstated within one calendar year, YDI...WGI will not issue any refunds. It is the responsibility of the client to ensure that a feasible resolution is met within one year of service initiation. YDI...WGI will do our best to accommodate scheduling needs within reason, additionally, we will ensure you are made aware of any upcoming expirations.

PROGRAM DEVELOPMENT

PACKAGE	SERVICES PROVIDED	TIME
<p><u>Comprehensive Program Development</u></p> <ul style="list-style-type: none"> ▪ This comprehensive package helps nonprofits develop new programs from start to finish, tailoring services to their mission and target population's needs. It's flexible, offering optional add-ons like grant writing, implementation support, and evaluation. 	<ul style="list-style-type: none"> ▪ Needs Assessment: Research and analysis to identify the target population's needs and how the program can address them. ▪ Program Concept Development: Creation of a unique program concept aligned with the nonprofit's mission and the target population's needs. ▪ Goal and Objective Setting: Development of specific, measurable, achievable, relevant, and time-bound (SMART) goals and objectives for the program. ▪ Program Design: Detailed design of the program, including the structure, activities, and timeline. ▪ Budget Development: Creation of a comprehensive budget for the program, including all projected costs. ▪ Evaluation Plan Development: Development of a plan to evaluate the program's success in achieving its goals and objectives. ▪ Secured Funding: Grant/Fundraising/Sponsorship-based on 	<p>4-6 weeks</p>



	<p>the program size and capacity – we will source appropriate funding resources with hopes of ensuring the full program launch: (3 funding applications/proposals max)</p> <ul style="list-style-type: none"> ▪ Reporting: A final report detailing all aspects of the program, including the concept, goals, budget, and evaluation plan. ▪ Marketing Strategy: strategic marketing plan to support program and community impact 	
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PROGRAM EVALUATION

PRICING: Pricing varies per evaluation: industry standard pricing is 10%-15% of total Grant award

TIMELINE: Program Evaluation is contracted for the term of the grant period

SERVICE OVERVIEW:
 Our Comprehensive Program Evaluation service provides in-depth analysis and actionable insights to assess program effectiveness, identify areas for improvement, and inform data-driven decision making.
 Our team of expert evaluators will collaborate with your organization to design a customized evaluation plan aligned with your program's goals, objectives, and stakeholder needs.

KEY COMPONENTS

- Evaluation Planning:
 - » Collaborative development of an evaluation framework and logic model.
 - » Identification of key evaluation questions and performance metrics.
- Data Collection:
 - » Design and implementation of data collection tools (e.g., surveys, interviews, focus groups).
 - » Collection of quantitative and qualitative data from relevant program stakeholders.
- Data Analysis:
 - » Thorough analysis of collected data using appropriate statistical and thematic analysis methods.
 - » Identification of trends, patterns, and insights related to program outcomes and areas for improvement.
- Reporting and Recommendations:
 - » Creation of a comprehensive evaluation report detailing findings, conclusions, and actionable recommendations.
 - » Presentation of results to key stakeholders, with opportunities for discussion and questions.

PROGRAM FACILITATION

PRICING: (SEE CONSULTANT)

- ❖ **Retainer Service Option:** available for ongoing program support and personnel management
- ❖ **Measurable Outcomes & Reporting:** Our base package includes methods of evaluation and program objectives. For ongoing reporting and measurement, consider our additional package option—ask your consultant for a breakdown.

SERVICE OVERVIEW:

- Our Optimized Program Execution service is designed to ensure your organizational services operate at peak capacity by leveraging our established network of professionals.
- We facilitate the contracting, recruitment, and launch of programs, closely aligning with your objectives and existing infrastructure.
- This service complements our Program Development offering, with a concentrated focus on personnel procurement and program implementation excellence.

KEY BENEFITS:

- Swift and effective program launch through expedited contracting and recruitment.
- Access to a vetted network of skilled professionals for optimized program operations.
- Enhanced organizational reputation through efficient and high-quality program execution.

EXPERT FACILITATION

- Our team manages contracting and recruitment, ensuring the right personnel for your program.
- We oversee all aspects of program launch, from logistics to staff training, guaranteeing a smooth rollout.

TURN-AROUND-TIME

- Initial consultation and customized service proposal within 24 hours.
- Contracting and recruitment phase: 1-3 weeks.
- Program launch preparation: 2-4 weeks.
- Ongoing program support: customized schedule



<ul style="list-style-type: none"> ▪ Ongoing support and monitoring to address challenges and optimize program performance. 	<p>based on organizational needs. (not to exceed 3 months)</p>
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PLEASE NOTE

- Compliance: A comprehensive compliance list will be provided to the client- it is the full responsibility of the *client* to adhere to all applicable regulatory standards.

GRANT RESEARCH & APPLICATION SUBMISSION

Secure grant funding for your nonprofit organization through targeted research, compelling applications, and a proven submission strategy. Equip your team with the tools and knowledge to pursue grant opportunities independently.

YDI/WGI doesn't guarantee funding, as grant awards are made solely by grantmaking organizations. Our role is to identify opportunities, develop applications, and provide tools to strengthen your grant seeking efforts. Fees cover these services, not funding outcomes.

Package: <u>Nonprofit Grant Bundle</u>	Time: 3-4 weeks	
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- **Grant Research:**
 - Conduct an in-depth analysis of your nonprofit's mission, goals, programs, and funding needs.
 - Utilize specialized grant research databases and tools to identify relevant grant opportunities from foundations, corporations, and government agencies.
 - Provide a list of 5-15 grant opportunities, including funder names, deadlines, funding priorities, and award ranges.
- **Grant Application Submission**
 - Collaborate with your team to gather necessary information and materials for one organizational grant and two program grants.
 - Review and finalize grant applications to ensure they are complete, compelling, and align with the funder's priorities and submission guidelines.
 - Submit the grant applications on behalf of the nonprofit.
- **Grant Proposal Template**
 - Create a customized grant proposal template for your nonprofit.
 - Include sections for the executive summary, needs statement, goals and objectives, methods, budget, evaluation, and organization information.
 - Provide instructions and tips for completing each section of the template.
- **Nonprofit Business Plan/Pitch Deck**
 - » *Collaborate with your team to develop a comprehensive nonprofit business plan, including:*
 - Executive summary
 - Organization description
 - Needs statement
 - Goals and objectives
 - Programs and services
 - Marketing and development strategy
 - Financial projections
 - Management and organization
 - » *Develop a compelling pitch deck based on the business plan, including:*
 - Mission and vision
 - Problem statement
 - Solution
 - Programs and impact
 - Goals and objectives
 - Budget and funding request
 - Team and organization

PREREQUISITES:



Our Grant Research & Application submission service package helps YDI...WGI deeply understand our clients' organizations by fulfilling key prerequisites. We then provide expert guidance, rooted in best practices, to optimize their outcomes and community impact. The Grant Readiness Assessment and checklist give us the information we need to conduct a thorough SWOT/GAP analysis. This nuanced understanding of each organization's strengths and growth areas informs the creation of a strong nonprofit business plan, compelling pitch deck, and successful grant applications.

- Clients must complete the Nonprofit Organization Comprehensive Checklist, providing at least 98% of the requested information. This will enable us to thoroughly understand the organization's mission, goals, programs, and funding needs.
- If the necessary information is not readily available, we recommend considering one of our organizational development packages to address any gaps. Alternatively, clients can gather the required information and engage our services once it is available.
- We will conduct a Grant Readiness Assessment to evaluate the organization's current status and ability to secure grant funding.
- A detailed SWOT (Strengths, Weaknesses, Opportunities, Threats) and GAP (Goals, Achievable, Priorities) analysis will be provided, including recommendations for improving grant readiness and competitiveness.

AD HOC SERVICES

Expedited Service Fee: Any service requests with a 15-calendar day window or less will be assessed a 20% expedited service fee

SERVICE & DESCRIPTION	TURN-AROUND-TIME
❖ FEDERAL GRANT APPLICATION RESEARCH AND SUBMISSION <ul style="list-style-type: none"> ▪ Research and identify relevant federal grants, develop compelling applications, and submit on behalf of the nonprofit. 	<ul style="list-style-type: none"> ▪ 30 Days
❖ LOCAL APPLICABLE GOVERNMENT CONTRACT PROPOSAL BID SUBMISSION <ul style="list-style-type: none"> ▪ Identify and research local government contract opportunities, develop competitive proposals, and submit on behalf of the nonprofit. 	<ul style="list-style-type: none"> ▪ 30 Days
❖ FOUNDATION SPONSORSHIP ROBUST PROPOSAL <ul style="list-style-type: none"> ▪ Research and identify potential foundation sponsors, develop tailored sponsorship proposals, and submit on behalf of the nonprofit. 	<ul style="list-style-type: none"> ▪ 45 Days
❖ FOUNDATION/PRIVATE FUNDER GRANT APPLICATION SUBMISSION & RESEARCH <ul style="list-style-type: none"> ▪ Research and identify relevant foundation and private funder grants, develop compelling applications, and submit on behalf of the nonprofit. 	<ul style="list-style-type: none"> ▪ 21 Days
❖ GRANT MANAGEMENT <ul style="list-style-type: none"> ▪ Oversee the grant management process, including reporting, compliance, and renewal applications. 	<ul style="list-style-type: none"> ▪ 5 Days- 6 months
❖ COMPLIANCE & RISK MANAGEMENT <ul style="list-style-type: none"> ▪ Conduct a compliance and risk assessment, develop policies and procedures, and provide training to staff and board. 	<ul style="list-style-type: none"> ▪ 21-30 Days
❖ NONPROFIT REGISTRATION AND FILING <ul style="list-style-type: none"> ▪ Assist with initial nonprofit state license registration, tax exemption application, and ongoing annual filings. 	<ul style="list-style-type: none"> ▪ 1-3 Days (application submission: License approval based on governing body (likely will be approved within 4-6 weeks)



RETAINER SERVICES

OVERVIEW: Our retainer service package is designed to provide ongoing support to nonprofits that have previously contracted with YDI/WGI. With a retainer, you'll have priority access to our expertise and the flexibility to use our services as needed within the minimum and maximum limits.

- This service option offers customized packaging tailored to meet your organization's specific needs.
- Please review the commitment guidelines. Your consultant is available to assess your current needs and recommend the most aligned service option, ensuring it's as feasible as possible.

CONDITIONS

Contract Hours:

- Minimum Retainer Contract: \$500 = 10 hours - 1-week, no discount applied
- Minimum Commitment: 10 hours per week (40 hours per month)
- Maximum Hours: 30 hours per week (120 hours per month)

Client may revise retainer commitment with minimum 10-calendar day notice

Payment Schedule Options:

- Payment Schedule: Monthly or bi-monthly
- Retainers under 30 days: 75% of invoice must be paid upfront, 25% due halfway through contract period.
- Contracts 30 days+: 20 hours at the hourly rate must be paid to initiate the retainer package.

SERVICES AVAILABLE UNDER THE RETAINER

- **Grant Research and Writing:** Research grant opportunities, write grant applications, and submit on behalf of your nonprofit.
- **Grant Management:** Oversee the grant management process, including reporting, compliance, and renewal applications.
- **Fundraising Strategy:** Provide ongoing support in implementing your fundraising strategic plan.
- **Compliance & Risk Management:** Provide ongoing support in maintaining compliance and managing risk.
- **Program Administration:** Provide support in administering your programs, including development of policies and procedures.
- **Organizational Administration:** Provide support in administering your organization, including HR and finance functions.
- **Compliance:** Ensure your organization is compliant with all relevant laws and regulations.
- **Contract/Funding Negotiations:** Negotiate contracts and funding agreements on behalf of your nonprofit.

TRACKING & REPORTING

- **Initial Strategic Planning Report:** An initial report will be provided within the first 5 days of the contract, outlining:
 - » The specific goals of the services
 - » The deadlines for the goals
 - » The plan for achieving the goals
- **Weekly Reports:** A weekly report will be provided every Friday, outlining:
 - » The specific work completed
 - » The hours spent on each task
 - » The progress made towards the goals
- **Monthly Reports:** A more detailed monthly report will be provided on the 1st of the month, including:
 - » A summary of the work completed
 - » The hours spent
 - » The progress made towards the goals
 - » Recommendations for next steps
- **GAP Analysis Report (for contracts > 30 days):** A GAP analysis report will be developed, implemented, and monitored, identifying:
 - » Gaps in the nonprofit's current practices compared to best practices
 - » Recommendations for addressing the gaps
 - » A plan for implementing the recommendations
 - » The GAP analysis report will be provided within the first 10 days of the contract, updated monthly, and finalized in the last 10 days of the contract
- **Final Report (for contracts < 30 days):** A final report will be provided on the last day of the contract,



including:

- » A summary of the work completed
- » The hours spent
- » The progress made towards the goals
- » Recommendations for next steps
- **Reporting Frequency**
 - » The initial strategic planning report will be provided within the first 5 days of the contract
 - » Weekly reports will be provided every Friday
 - » Monthly reports will be provided on the 1st of the month
 - » The GAP analysis report will be provided within the first 10 days of the contract, updated monthly, and finalized in the last 10 days of the contract
 - » The final report will be provided on the last day of the contract

YDL... WGI INTERIM STAFFING SOLUTIONS

NONPROFIT INTERIM LEADERSHIP AND MANAGEMENT STAFFING SERVICE

- » Our interim staffing service provides experienced nonprofit leaders and managers to fill critical gaps on a temporary basis. Whether you're facing a sudden departure, a planned leave, or a seasonal increase in workload, our seasoned professionals can step in to provide stability and continuity.

Contract Terms

- Minimum Commitment: 2 weeks, with a minimum of 80 hours worked per 2-week period.
- Maximum Duration: 6 months (180 days), with a total of up to 990 working hours.
- Flexible Scheduling: Interim staff can work a variety of schedules, from full-time to part-time, to meet your needs.

Benefits of Interim Staffing

- Immediate Expertise: Skilled professionals hit the ground running, with no ramp-up time.
- Stability and Continuity: Ensure ongoing operations and avoid disruption to your mission.
- Objective Perspective: Fresh eyes can bring new ideas and solutions.
- Cost-Effective: Avoid the costs of recruiting, hiring, and training permanent staff.
- Bridge to Permanent Hire: Interim staff can hold the fort while you find the right long-term fit.

How We Work

- Organization Needs Assessment: We'll conduct a thorough assessment to understand your nonprofit's specific needs, goals, and culture.
- Consultation and Analysis: We'll discuss our findings with you, outlining the requirements of the interim role and the best approach.
- Candidate Selection: We'll provide you with a pool of carefully vetted candidate resumes for your review and selection.
- Onboarding: The selected candidate will operate as an independent contractor, adhering to all your organization's policies and compliance standards. We'll facilitate a smooth transition to ensure they're set up for success.
- Ongoing Support: We'll schedule regular check-ins to ensure client satisfaction. For contracts running longer than 3 months, we'll require monthly updates on the interim's progress. Your feedback is crucial – we ask for full transparency to ensure we're operating at optimal capacity. A short engagement survey will be required at the conclusion of the contract.
- Contract Facilitation Fees:
 - ❖ 1-2 weeks: \$250
 - ❖ 3-6 weeks: \$500
 - ❖ Contracts greater than 2 months: \$1,500 (\$750 due at contract initiation, \$750 due at the end of the first contract month)
 - ❖ All other contract fees are required to be paid in full to initiate the contract.

Key Roles We Staff

- ❖ **Director of Program Development:** Experienced professionals skilled in designing, implementing, and evaluating programs to further your nonprofit's mission.
- ❖ **Organizational Administrator:** Seasoned administrators with expertise in overseeing day-to-day operations, including finance, HR, and facilities.
- ❖ **Compliance Officer:** Specialists with deep knowledge of nonprofit regulations, ensuring your organization meets all



- legal and ethical requirements.
- ❖ **Grants Manager:** Experts in researching funding opportunities, writing compelling grant proposals, and managing grant reporting.
- ❖ **Marketing Director:** Strategic marketers skilled in raising your nonprofit's profile, engaging supporters, and promoting your mission.
- ❖ **Human Resources Director:** HR leaders with expertise in recruitment, employee relations, benefits, and more.

NONPROFIT ORGANIZATION CHECKLIST

<p>ORGANIZATIONAL INFORMATION</p> <ul style="list-style-type: none"> <input type="checkbox"/> Mission Statement: Clearly articulate the nonprofit's purpose and goals. <input type="checkbox"/> Vision Statement: Outline the desired long-term impact and future vision. <input type="checkbox"/> Values: List the core principles guiding the organization's work. <input type="checkbox"/> History: Briefly describe the organization's founding, evolution, and key milestones. <input type="checkbox"/> Legal Structure: Specify the type of 501(c)(3) designation (public charity, private foundation, etc.). 	<p>GOVERNANCE</p> <ul style="list-style-type: none"> <input type="checkbox"/> Board of Directors: <ul style="list-style-type: none"> <input type="checkbox"/> List current board members, their roles, and terms. <input type="checkbox"/> Describe the ideal board composition (skills, expertise, diversity). <input type="checkbox"/> Outline board responsibilities and expectations. <input type="checkbox"/> Executive Leadership: <ul style="list-style-type: none"> <input type="checkbox"/> Provide bios of key staff (CEO, CFO, department heads). <input type="checkbox"/> Describe the organizational structure and reporting lines.
<p>PROGRAMS AND SERVICES</p> <ul style="list-style-type: none"> <input type="checkbox"/> Current Programs: Detail active initiatives, including goals, target populations, and metrics. <input type="checkbox"/> Program Evaluation: Describe methods for assessing program effectiveness and impact. <input type="checkbox"/> Future Programs: Outline planned or conceptual initiatives. 	<p>FINANCIALS</p> <ul style="list-style-type: none"> <input type="checkbox"/> Budget: Include current and projected budgets, broken down by program and operations. <input type="checkbox"/> Funding Sources: List current and potential revenue streams (grants, donations, events). <input type="checkbox"/> Financial Policies: Outline procedures for financial management, transparency, and accountability.
<p>MARKETING AND COMMUNICATIONS</p> <ul style="list-style-type: none"> <input type="checkbox"/> Target Audiences: Identify key stakeholders, including donors, volunteers, beneficiaries. <input type="checkbox"/> Brand Identity: Describe the nonprofit's unique value proposition and image. <input type="checkbox"/> Marketing Strategies: Detail current and planned outreach efforts (social media, events, PR). 	<p>OPERATIONS</p> <ul style="list-style-type: none"> <input type="checkbox"/> Facilities and Equipment: Describe current assets and any needs or plans for expansion. <input type="checkbox"/> Human Resources: Outline HR policies, including staffing, volunteer management, and recruitment. <input type="checkbox"/> Technology: Assess current systems and potential needs for improvement.

GRANT READINESS ASSESSMENT

ORGANIZATION INFORMATION
<p><u>Demographic Information:</u></p> <ul style="list-style-type: none"> ▪ Name of Organization: ▪ Year Established: ▪ Address: ▪ Website: ▪ Social Media:
ORGANIZATION BACKGROUND
MISSION STATEMENT:
Key Programs and Initiatives:
ADMINISTRATIVE ASSESSMENT



<p>Do you have an Employer Identification Number (EIN)? (if so please provide)</p> <p>Yes No</p>
<p>Do you have a 501(c)(3) status?</p> <p>Yes No</p>
<p>Do you have a Board of Directors? If yes, please provide a list of their names and affiliations.</p> <p>Yes No</p>
<p>FINANCIAL READINESS</p>
<p>Has your organization ever received a grant before? If yes, please provide a list of grantors and the amounts received.</p> <p>Yes No</p>
<p>Do you have a current year operating budget? (if applicable please provide)</p> <p>Yes No</p>
<p>Do you have a current program operating budget? (if applicable please provide)</p> <p>Yes No</p>
<p>Do you have audited financial statements for the past two years? (if applicable please provide)</p> <p>Yes No</p>
<p>PROGRAMMATIC READINESS</p>
<p>Do you have a strategic plan in place? If yes, please provide a brief overview.</p> <p>Yes No</p>
<p>Do you have clearly defined goals and objectives for your programs?</p> <p>Yes No</p>
<p>Can you provide data or evidence that supports the need for your programs?</p> <p>Yes No</p>
<p>EVALUATION AND SUSTAINABILITY</p>
<p>Do you have a method for evaluating the success and impact of your programs?</p> <p>Yes No</p>
<p>Do you have plans for sustaining your programs beyond the grant period?</p> <p>Yes No</p>
<p>ADDITIONAL INFORMATION</p>



Is there any additional information that you feel is important for us to know about your organization's readiness to apply for and manage a grant?

TERMS & CONDITIONS

These Terms and Conditions ("Terms") apply to all service contracts between *You Dream It... We Grant It!* Consulting Firm ("Consultant") and our clients ("Client" or "You"). Please read these Terms carefully. By engaging our services, you acknowledge that you have read, understand, and agree to be bound by these Terms.

1) SERVICE AGREEMENTS

A Service Agreement is required for all services provided by the Consultant. This Agreement outlines the scope of work, responsibilities of both parties, and terms specific to the engagement. The Service Agreement is designed to protect the interests and investments of both the Client and the Consultant.

2) PAYMENTS

- A deposit of 50% of the total Service Agreement fee is required to initiate services.
- Fee Schedules, including terms, will be outlined in the Service Agreement.
- Failure to pay invoices may result in a pause of service deliverables and potential contract termination after a 20-day delinquency.

3) EXPEDITED SERVICE REQUESTS

- Services with less than a 21-day deliverable window are considered expedited. A 20% service fee will be applied to all expedited Service Agreements. Expedited services require full payment to initiate.

4) CUSTOMIZED PACKAGING

- The Consultant offers customized packaging tailored to the Client's needs. Packaging and pricing must be reviewed and agreed upon with the Consultant prior to service initiation. Customized packages cannot be modified after services begin.

5) CONTRACT TERMINATION

- Please review the detailed termination policy outlined in the Service Agreement. Our no refund policy is strictly enforced; terminated contracts are not eligible for refunds.
 - » Contracts terminated at no fault of the client may be eligible for a partial refund – based on services completed.
 - » Early terminated contracts: may be issued a YDI...WGI service credit (credits will not exceed 365 days)
 - ❖ Service credits are not guaranteed.
 - ❖ Reinitiating services must align with current YDI...WGI calendar- if it is not feasible to honor service credit prior to expiration- consultant and client may discuss extenuating circumstances.

6) SERVICE REFUSAL

- The Consultant reserves the right to refuse service to any Client. In such cases, a written explanation will be provided.

7) PROOF OF FUNDING

- The Client agrees to provide the Consultant with proof of funding for all applications submitted on their behalf.

8) RETAINER SERVICES

- Retainer services require a new Service Agreement and the commencement of a new contract.

9) EXIT SURVEYS

- The Client agrees to complete an exit survey and service satisfaction statement upon conclusion of every Service Agreement.



Small Business

COMPREHENSIVE
SERVICE PACKAGE &
PRICING OUTLINE





SMALL BUSINESS SERVICES

Here at *You DREAM it...We GRANT it! (YDI...WGI)*, we're happy to serve as your dedicated partner in navigating the complex challenges faced by entrepreneurs daily. Our tailored services are designed to bridge funding gaps and ensure your business achieves desired sustainability. With our expert guidance, tools, and resources, we'll not only assist you in securing the funding you need but also position your business for the success you've always envisioned.

Let's secure the future of your business together!

<h3 style="margin: 0;"><u>SMALL BUSINESS SERVICES</u></h3> <h2 style="margin: 0;">TABLE OF CONTENTS</h2>	<p><u>SERVICE LISTING</u></p> <ul style="list-style-type: none"> 1: Licensing <ul style="list-style-type: none"> 1:1 Tiered Packaging 2: Business Plan Development <ul style="list-style-type: none"> 2:1 Tiered Packaging 3: Procurement/ Government Contract Bidding <ul style="list-style-type: none"> 3:1 Tiered Packaging 3:2 Minority Business Certification(s) <p><u>SERVICE ASSESSMENT</u></p> <ul style="list-style-type: none"> 4: Checklist 5: Assessment <p><u>TERMS & CONDITIONS</u></p> <ul style="list-style-type: none"> 8: Terms & Conditions outline
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BUSINESS LICENSING

Objective: Streamline the business licensing process for clients in Pennsylvania, ensuring all necessary licenses and tax registrations are obtained to operate legally.

PACKAGES	PACKAGE OUTLINE	TURN-AROUND- TIME
<p>Bronze:</p> <ul style="list-style-type: none"> ▪ Business Licensing 	<ul style="list-style-type: none"> ▪ Preparation and filing of the necessary documents with the Pennsylvania Department of State to register the business entity (e.g., Articles of Organization for an LLC, Articles of Incorporation for a Corporation). ▪ Federal Tax ID Number EIN Application ▪ Obtainment of the business's License and EIN 	<p>2 weeks</p>
<p>Silver:</p> <ul style="list-style-type: none"> ▪ Business Licensing & Tax Registration 	<p><i>Inclusive of everything provided in the Bronze Package, plus:</i></p> <ul style="list-style-type: none"> ▪ Registration with the Pennsylvania Department of Revenue for: ▪ Sales Tax License (if applicable) ▪ Use Tax License (if applicable) ▪ Employer Withholding Account Number (if hiring employees) ▪ Other relevant tax accounts (e.g., Realty Transfer Tax, Public Transportation Assistance Fund Taxes) 	<p>4 weeks</p>
<p>Platinum:</p> <ul style="list-style-type: none"> ▪ Business Licensing and Credit Analysis 	<p><i>Inclusive of everything provided in the Silver Package, plus:</i></p> <ul style="list-style-type: none"> » <i>Pricing and time TBD based on client credit report and established business credit</i> ❖ <u>Obtain Business Credit Reports</u> <ul style="list-style-type: none"> ▪ Retrieval of the client's business credit reports from the major commercial credit bureaus (Dun & Bradstreet, Experian Business, Equifax Business). ▪ Analysis of the reports, highlighting positive aspects and identifying areas for improvement. 	<p>2-4 Months</p>



	<ul style="list-style-type: none"> ❖ <u>Establish Business Credit History</u> <ul style="list-style-type: none"> ▪ Assistance with opening a few vendor credit accounts (e.g., Net 30 terms with suppliers reporting to business credit bureaus). ▪ Guidance on how to maintain positive payment history with these vendors. ❖ <u>Credit Application Support</u> <ul style="list-style-type: none"> ▪ Preparation of a business credit application package, including: <ul style="list-style-type: none"> ▪ Business profile information ▪ Financial statements (if necessary) ▪ Review of the client's creditworthiness before submitting applications. ❖ <u>Ongoing Credit Monitoring (Optional)</u> <ul style="list-style-type: none"> ▪ Monthly or quarterly monitoring of the client's business credit reports. ▪ Alerts for changes, updates, or potential identity theft. ❖ <u>60-Minute Credit Review and Strategy Session</u> <ul style="list-style-type: none"> ▪ In-depth review of the client's initial business credit reports. ▪ Customized strategy to improve their business credit scores over time. 	
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BUSINESS PLAN DEVELOPMENT

Our comprehensive business plan service is designed to help entrepreneurs and small business owners create a robust and effective business plan. Our experienced consultants will work closely with you to understand your business goals and objectives, conduct market research, and develop a customized business plan that will serve as a roadmap for your company's success.

SERVICE PACKAGE	TIME
<p>Basic Business Plan – 10-15 pages</p> <ul style="list-style-type: none"> ❖ Scope of Work <ul style="list-style-type: none"> ▪ Initial consultation to discuss business goals and objectives. ▪ Market research and analysis ▪ Development of a basic business plan, including: <ul style="list-style-type: none"> ▪ Executive summary ▪ Company description ▪ Market analysis ▪ Organization and management ▪ Service or product line. <p>(maximum 3 revisions)</p>	2 weeks
<p>Advanced Business Plan – 20-25 pages</p> <ul style="list-style-type: none"> ❖ Scope of Work <ul style="list-style-type: none"> ▪ Everything in the Basic Package ▪ Additional market research and competitive analysis ▪ Development of a premium business plan, including: <ul style="list-style-type: none"> ▪ Expanded market analysis. ▪ Detailed marketing and sales strategy ▪ Financial projections (3-5 years) ▪ Break-even analysis <p>(Multiple review and revision cycles- not to exceed 5)</p>	1 month
<p>Premium Business Plan – 30-40 pages</p> <ul style="list-style-type: none"> ❖ Scope of Work <ul style="list-style-type: none"> ▪ Everything in the Basic Package ▪ Personalized consultation and coaching sessions ▪ Customized business plan tailored to the client's specific needs. 	6 weeks



- Development of an elite business plan, including:
 - Detailed company description
 - Comprehensive organization and management plan
 - In-depth product or service description
 - Advanced financial projections (5-10 years)
 - Visual Pitch deck
- **Deliverables**
 - ∇ Final business plan document (30-40 pages)
 - ∇ Financial projection spreadsheets
 - ∇ Custom appendices (as needed)

PROCUREMENT/ GOVERNMENT CONTRACT BIDDING

Need help with proposal research and submission? Whether you're just starting your search or feeling overwhelmed, we've got you covered! Navigating government contracts can be a headache – but YDI...WGI is here to eliminate that stress and serve as your one-stop shop for securing local and federal contract bids. We get it – one-size-fits-all doesn't work for government contract services. That's why our tiered package design is tailored to meet each client where they are, with the primary goal of not charging for services you don't need. Our targeted assessment cuts through the confusion. It quickly determines your current status and pinpoints the exact needs your business has when it comes to government contract services.

Determining Service Package: Your assessment results guide our recommendations. Once it's complete, we'll advise you on the best-fit packages to help you reach your government contract goals.

Objective: Government contracts are a goldmine for small businesses, offering steady revenue and breathing room for sustainability worries. That's where we come in. At YDI...WGI, our ultimate goal is to secure your first feasible contract, acting as your launchpad to a series of successful contract wins.

Service Terms & Conditions

- **Succession rate:** A succession rate is a fee paid by the client to the consultant for the assistance provided in the contract award. The succession rate is typically a percentage of the total contract value:
 - ❖ YDI...WGI: succession rate terms:
 - ∇ For contract awards over \$500,000, the succession rate is **3%** of the total contract value.
 - ∇ For contract awards totaling \$500,000 or less, the succession rate is **6%** of the total contract value.
 - » The succession rate only applies to the total initial contract award. If the contract is extended, no additional succession fee is due, as the extension is based solely on the client's performance.
 - ∇ Succession Payment Schedule
 - » 100% succession fee paid in full within **24** hours of receipt of first contract award deposit.
 - » Fee Schedule: Not to exceed **180 days**; client and consultant will outline a detailed fee schedule.
- **Capacity Statement:** A Capability Statement is a brief document that summarizes a company's core competencies, skills, and experience. It's essentially a business resume that highlights what makes your company unique and qualified to perform certain types of work. A good Capability Statement should include:
 - ∇ Company name and contact information.
 - ∇ NAICS codes
 - ∇ Core capabilities.
 - ∇ Past performance references
 - ∇ Point of contact
- **NAICS Code:** NAICS Codes are a standard used by the US government to classify businesses by industry. The NAICS system is used by federal agencies, state governments, and other organizations to organize and track data related to businesses and the economy. Each NAICS code represents a specific industry or sector, ranging from broad categories like "Manufacturing" or "Professional, Scientific and Technical Services" to more specific industries like "Commercial Bakeries" or "Software Publishers".
 - ∇ NAICS codes are typically 2-6 digits long. The first two digits represent the sector, the third digit represents the subsector, the fourth digit represents the industry group, and the fifth and sixth digits represent the NAICS industry.
- **Vendor Registration:** Vendor Registration refers to the process of registering your business in various government databases and systems in order to be eligible for government contracts. The most important registration is SAM.gov (System for Award Management), which is the official database of the US federal government. SAM.gov registration is required for all federal contractors and vendors.
 - ∇ Registering in these systems makes your business visible to government buyers and increases your chances of finding and winning contract opportunities. It's essentially a prerequisite for doing business with the government.



<ul style="list-style-type: none"> ▪ RFP (Request For Proposal): An RFP, or Request for Proposal, is a formal document that government agencies use to solicit bids from contractors for a specific project or service. It outlines the agency's requirements, specifications, and evaluation criteria for the contract. <ul style="list-style-type: none"> ▽ Overview of the project and objectives ▽ Scope of work ▽ Technical requirements ▽ Proposal submission instructions ▽ Evaluation criteria ▽ Contract terms and conditions. ▪ Contract Listing: A Contract Listing, also known as a Contract Opportunity Listing, is a publicly available notice of a government contract solicitation. It's typically posted on government websites like beta.SAM.gov or agency-specific contracting portals. The comprehensive listing includes: <ul style="list-style-type: none"> ▽ Solicitation number ▽ Agency name ▽ Contract title and description. ▽ NAICS codes ▽ Set-aside designation (if applicable) ▽ Response deadline ▽ Point of contact 	
<p>Ad Hoc Package Options:</p> <ul style="list-style-type: none"> ▪ Capacity Statement ▪ Vendor Registration ▪ Sourced contract listing ▪ RFP package(s) 	
<p>STANDARD SERVICE PACKAGE OUTLINE</p> <hr/> <p>Included With Package:</p> <ul style="list-style-type: none"> ▪ Capacity Statement: <u>1</u> industry per standard package ▪ Vendor Registration: <u>5</u> registrations per standard package ▪ RFP/Contract Bid: <u>2</u> per standard package ▪ Sourced Contracts: <u>6</u> minimum sourced contract bids per standard package – not to exceed <u>10</u> sourced potential contracts 	<p>Scope of Services</p> <ul style="list-style-type: none"> ▪ Source, Review and Analyze the RFP and contract requirements ▪ Conduct market research and competitive analysis ▪ Develop a bid strategy and win themes ▪ Write and edit the bid proposal ▪ Coordinate the collection of required documents and appendices ▪ Review and finalize the bid package ▪ Submit the bid package by the deadline
<p>COMPREHENSIVE SERVICE PACKAGE OUTLINE</p> <hr/> <p>Service Package Outline:</p> <ul style="list-style-type: none"> ▪ The same deliverables as the standard service package; adding <u>one</u> additional service industry 	<p>Service Deliverables</p> <ul style="list-style-type: none"> ▪ Completed bid proposal ▪ Finalized bid package ready for submission ▪ Resumes of key personnel
<p>RETAINER CONTRACT BIDDING SERVICES</p> <hr/> <p>Service Duration: 6 months</p> <p>Service Restrictions:</p> <ul style="list-style-type: none"> ▪ Not to exceed <u>2</u> contract proposals per month per retainer service agreement ▪ Minimum <u>2</u>-month contract requirement ▪ <u>5</u> guaranteed sourced contracts per month- not to exceed <u>10</u> sourced contacts monthly 	<p>Service Outline</p> <ul style="list-style-type: none"> ▪ Research and identification of relevant RFPs (up to 5 per month) ▪ Analysis of selected RFPs and recommendation on which to pursue ▪ Assistance with bid proposal development (minimum 1 bid monthly- not to exceed 2 bids per month) ▪ Review and editing of completed bid proposals <p>Deliverables</p> <ul style="list-style-type: none"> ▪ Monthly RFP report highlighting relevant opportunities ▪ Bid strategy and win themes for selected RFPs ▪ Edited and finalized bid proposals



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MINORITY BUSINESS CERTIFICATIONS

What are Minority Business Certifications?

Minority business certifications are programs that verify a business is at least 51% owned, controlled, and operated by individuals from diverse backgrounds. These certifications aim to promote diversity, equity, and inclusion by providing opportunities for underrepresented groups in government contracting and corporate supply chains.

Benefits of Minority Business Certifications

- **ACCESS TO CONTRACTS:** Many government agencies and corporations set aside a percentage of their contracts for certified minority-owned businesses.
- **BUSINESS DEVELOPMENT OPPORTUNITIES:** Certification can open doors to networking events, training programs, and mentorship opportunities.
- **INCREASED CREDIBILITY:** Certification is a third-party verification of a business's minority ownership and control, which can enhance its reputation.

PACKAGE OPTIONS	PACKAGE DESCRIPTION
<p><i>Standard Package</i> <i>Comprehensive Package</i> <i>Premium Package</i></p>	<ul style="list-style-type: none"> ▪ Standard Package: <ul style="list-style-type: none"> ∇ Certification Application Preparation: We'll work with you to prepare one minority business certification application (e.g., MBE, WBE, DBE). This includes: <ul style="list-style-type: none"> ∇ Gathering required documents ∇ Completing the application ∇ Reviewing for accuracy and completeness ∇ Application Submission: We'll submit the application on your behalf and ensure it's received by the certifying agency. ∇ Follow-Up: We'll follow up with the agency to confirm receipt and provide guidance on the review process. ▪ Comprehensive Package: <ul style="list-style-type: none"> ∇ Multiple Certification Applications: We'll prepare and submit 2-3 minority business certification applications tailored to your business. ∇ All Standard Package Services: You'll receive all the services from the Standard Package for each certification application. ∇ Strategy Consultation: We'll provide a consultation to determine the most beneficial certifications for your business and develop a strategy to leverage them. ▪ Premium Package: <ul style="list-style-type: none"> ∇ All Comprehensive Package Services: You'll receive all the services from the Comprehensive Package. ∇ Contract Bidding: Inclusive of standard contract bidding contract service package ∇ Priority Consultation: You'll receive priority consultation for any questions or concerns regarding the certification process and contract bidding.

OPERATING STATES: Pennsylvania, Maryland, and Delaware

Minority Business Certifications:

Pennsylvania

- WBE (Women Business Enterprise): At least 51% owned by women, with a personal net worth of less than \$750,000.
- VBE (Veteran Business Enterprise): At least 51% owned and operated by veterans, with good moral character.
- DBE (Disadvantaged Business Enterprise): For-profit, at least 51% owned by a qualifying U.S. citizen, meeting financial requirements.
- MBE (Minority Business Enterprise): At least 51% owned, managed, and operated by minority group members who are U.S. citizens, with good moral character.

Delaware

- WBE: At least 51% owned by women, with a 3-year average gross income of \$350,000 or less.



- VBE: At least 51% owned, managed, and operated by veterans, with good moral character.
- DBE: For-profit, at least 51% owned by a U.S. citizen who is at least 25% Black, Native American, Hispanic, or Asian.
- MBE: At least 51% owned, managed, and operated by minority group members who are U.S. citizens, with good moral character.

Maryland

- WBE: At least 51% owned by women, with a personal net worth of less than \$750,000.
- VBE: At least 51% owned, managed, and operated by veterans, with good moral character.
- DBE: For-profit, at least 51% owned by a U.S. citizen who is at least 25% Black, Native American, Hispanic, or Asian.
- MBE: At least 51% owned, managed, and operated by minority group members who are U.S. citizens, with good moral character. Determined by minority status, ownership, control, size, and personal net worth of the minority owner(s).

CERTIFICATION DOCUMENTATION CHECKLIST

Business Information:

- Business name
- DBA (doing business as) name, if applicable
- Business address
- Mailing address, if different
- Business phone number
- Business email address
- Website URL, if applicable
- Federal tax ID number (EIN)
- DUNS number, if applicable
- NAICS codes
- Business description
- Years in operation
- Number of employees
- Annual gross revenues

Financial Documents:

- Three years of business tax returns (1120, 1120S, 1065)
- Personal tax returns for owners, if requested
- Balance sheet
- Income statement
- Accounts payable/receivable aging reports
- Loan documents
- Line of credit agreements

Insurance Policies:

- General liability insurance
- Professional liability insurance, if applicable
- Workers' compensation insurance, if applicable
- Commercial auto insurance, if applicable
- Umbrella insurance, if applicable

Contracts and Agreements:

- Lease agreement, if renting business premises
- Service contracts
- Vendor agreements
- Joint venture agreements, if applicable
- Mentor-protégé agreements, if applicable

Ownership Information:

- Owner names
- Ownership percentages
- Ethnicity/race
- Gender
- Veteran/service-disabled veteran status, if applicable
- Citizenship status
- Resumes
- Biographies
- List of other business interests

Organizational Documents:

- Articles of incorporation
- Articles of organization (for LLCs)
- Business license
- Fictitious business name statement (DBA), if applicable
- Bylaws or operating agreement
- Stock certificates and ledger, if applicable
- Partnership agreement, if applicable
- Trust agreement, if applicable

Other Documents:

- Certificates of insurance for subcontractors, if applicable
- Resumes of key personnel
- List of clients and projects
- Marketing brochures
- Proof of registration with SAM.gov, if applicable

SMALL BUSINESS CHECKLIST

BUSINESS OPERATIONS DOCUMENTS

- Business Plan: Is there a written business plan outlining the company's mission, goals, target market, financials, and management team?

FINANCIAL DOCUMENTS

- Balance Sheet: Is the company's balance sheet up-to-date and accurately reflecting its financial position?
- Income Statement: Is the income statement current and providing a clear picture of revenues, costs, and profits?



<ul style="list-style-type: none"> <input type="checkbox"/> Articles of Incorporation: Are the articles of incorporation (or similar documents for LLCs, sole proprietorships) readily available? <input type="checkbox"/> Business Licenses: Are all necessary business licenses and permits up-to-date? <input type="checkbox"/> Insurance Policies: Are liability insurance, workers' compensation insurance (if applicable), and other relevant policies in place? <input type="checkbox"/> Contracts: Are customer contracts, vendor contracts, lease agreements, and other legal agreements properly documented and stored? <input type="checkbox"/> Organizational Chart: Is there an organizational chart showing the company's structure and reporting lines? 	<ul style="list-style-type: none"> <input type="checkbox"/> Cash Flow Statement: Is a cash flow statement available, showing inflows and outflows of cash? <input type="checkbox"/> Accounts Receivable/Payable Aging: Are A/R and A/P aging reports available, showing the status of customer payments and vendor invoices? <input type="checkbox"/> Invoices: Are invoices to customers properly numbered, formatted, and stored? <input type="checkbox"/> Expense Records: Are business expenses properly documented, categorized, and stored for tax purposes? <input type="checkbox"/> Tax Returns: Are past business tax returns readily available?
<p>MARKETING & BRANDING DOCUMENTS</p> <ul style="list-style-type: none"> <input type="checkbox"/> Marketing Plan: Is there a marketing plan outlining target markets, strategies, and goals? <input type="checkbox"/> Website: Is the company website current, professional, and effectively promoting products/services? <input type="checkbox"/> Social Media: Are social media accounts active, engaging, and aligned with the company brand? <input type="checkbox"/> Sales Process: Is the sales process documented, from lead generation to conversion? <input type="checkbox"/> Customer Agreements: Are customer agreements properly outlining terms, conditions, and expectations? <input type="checkbox"/> Market Research: Is market research conducted regularly to understand competitors and customer needs? 	<p>HUMAN RESOURCE DOCUMENTS</p> <ul style="list-style-type: none"> <input type="checkbox"/> Employee Handbook: Is there an employee handbook outlining company policies, benefits, and expectations? <input type="checkbox"/> Job Descriptions: Are job descriptions written for each position, outlining roles, responsibilities, and qualifications? <input type="checkbox"/> Employee Files: Are employee files complete, including resumes, W-4s, I-9s, performance reviews, and disciplinary actions? <input type="checkbox"/> Payroll Records: Are payroll records accurate and up-to-date, showing salaries, hours worked, taxes withheld, and benefits? <input type="checkbox"/> Confidentiality/Non-Disclosure Agreements: Have employees signed confidentiality/non-disclosure agreements (if applicable)?

GOVERNMENT CONTRACTING ASSESSMENT

Business Operations

1. What is your business's legal structure (sole proprietorship, partnership, corporation, LLC)?
2. Do you have a dedicated business bank account?
3. What is your business's NAICS code?
4. Do you have a written business plan?
5. What are your core products/services?
6. Who are your main competitors?
7. Do you have any certifications (8(a), WOSB, SDVOSB, HUBZone)?

Financials

1. What are your annual revenues for the past 3 years?
2. What is your current profit margin?
3. Do you have a line of credit or access to capital?
4. What are your accounts receivable and payable terms?
5. Do you have a financial management system in place?

Marketing

1. Do you have a marketing plan?
2. What are your marketing channels (website, social media, email, paid ads)?
3. Who is your target market?
4. What is your unique selling proposition (USP)?
5. Do you have a sales team or process in place?

Government Contracting

1. Have you registered in SAM.gov?
2. Do you have a DUNS number?
3. Have you obtained any relevant federal certifications (8(a), WOSB, SDVOSB, HUBZone)?
4. Do you have past performance references?
5. Have you bid on government contracts before?



6. Do you have a federal contracting officer contact?
7. Are you familiar with the FAR and DFARS?
8. Do you have a GSA schedule contract?

Additional Questions

1. How long has your business been in operation?
2. What is your staff size?
3. Do you have any subcontracting experience or plans?
4. Are you able to meet federal contracting insurance requirements?
5. Do you have a facility clearance (if required)?

Scoring

Assign the following points for each answer:

- 5 points: Yes, we have this in place and it's strong.
- 3 points: We have this, but it needs improvement.
- 1 point: We don't have this, but it's in our plans.
- 0 points: We don't have this and no plans to get it.

Add up your points. Here's how to interpret your score:

- 90-100 points: You're ready to bid on government contracts. Your business is well-positioned to pursue and win federal contracts.
- 80-89 points: You're almost ready. You have a good foundation, but need to address a few areas before bidding.
- 70-79 points: You have potential, but need to work on your business infrastructure and government contracting knowledge before bidding.
- Below 70 points: You're not ready. You need to establish a solid business foundation and understand government contracting requirements before pursuing federal contracts.

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- The Client agrees to complete an exit survey and service satisfaction statement upon conclusion of every Service Agreement.



Thank You!



Thank you for your continued interest in YDI...WGI. Now that you've explored the services we offer, I want to express my sincere gratitude for considering us as your potential partner. We anticipate the opportunity to leverage our tools, resources, and expertise to collaborate with you and your team. Whether your line of business is for-profit or nonprofit, our tailored packages are designed to meet the unique needs of local leaders like yourself. YDI...WGI's primary goal is to help ease the organizational, financial, and regulatory stress that so often plague entrepreneurs and community leaders.

If you have any questions or would like to discuss how our services can be customized for your organization, please don't hesitate to reach out. We're always here to listen and look forward to the possibility of working together.

Thank you once again for your continued interest in YDI...WGI.

The future belongs to those who believe in the beauty of their dreams! ~Eleanor Roosevelt

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“Every great dream begins with a dreamer. Always remember, you have within you the strength, the patience, and the passion to reach for the stars to change the world.” ~Harriet

Tubman

“She Believed she could... so she did! “...

Kristin Dominique