

## À La Carte Menu – Impetus Impact

### Option A) Top 10 Donors & Competitive Analysis: \$350

Purpose: The basic information of which donors are giving funds within your sector *and* which organizations are receiving those funds. Knowing which foundations are donating within your (sub-)sector will increase your knowledge of: 1) if your impact focus is niche or common, 2) capacity to spend your annual investment per year, 3) increased success for potentially funding new organizations, 4) opportunities to fund joint projects/nonprofits with partners, etc.

#### What you get:

- Data on donors that are giving within specific sectors, and sub-sectors, related to your foundation's focus. Dataset can have a range of 2003 to present, will rank donors by the number of grants they gave within set time range, as well as search for donors that do and do not accept unsolicited grant applications plus researching USG and non-USG donors.
  - Donor Data includes:
    - Grantmakers' name
    - Amount funded per donors given in a specific sector/per search criteria
    - Number of grants given per donors per search criteria
  - Competitive Analysis includes:
    - Organizations that have received funding from specific donors per same search criteria
- Access to Top Donor Analysis spreadsheet template and final project (Excel)
- Thirty-minute conference call to review data, and possible recommendations for next-steps.
  - Note: spreadsheet to include up to four (4) sub-/sector criteria (agreed upon with client per available search criteria).
  - Additional criteria and work will be charged at \$70/hour rate

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### Option B) Organization Contacts: \$250

Purpose: Your foundation wants to spread your outreach to ensure you give the maximum amount of funds per year. Paired with Option A, or from a list of organizations received from the client, Impetus Impact can research *who* at such organizations would be ideal to reach out to for a potential funding opportunity from your foundation.

#### What you get:

- Analysis and list of people at organizations who would be good to reach out to
- Spreadsheet breakdown of organizations, organization's contact/s, their contact details and LI profile links, and notes on each contact
- Cold-email template to connect to each contact
- Thirty-minute conference call to review materials and recommendations for next-steps.
  - Notes:
    - The client provides organizations to be researched. If no organizations are known, then Option A will provide a list of this Option to be conducted. If these choices are not available, Impetus Impact can research said list at \$70/hour rate.

\*This can be altered per client's request

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- All research will be obtained legally using publicly available data - nothing shady.
- Names of people at organizations should not be a problem. No guarantee of how many people's contact details (e.g. email addresses) I can find; limit four per nonprofit.

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### Option C) Organization Analysis: \$1,700

Purpose: Possible scenario - Your foundation wants to fund new grantees and your Board of Directors wants to ensure nonprofit applicants are vetted thoroughly. This option provides your foundation with in-depth research, data and details to help you make an informed decision: take a risk and fund an organization you haven't funded before *or* maintain the status quo and fund the same organizations time and time again. Data would be from the last two years or the most recent available.

#### What you get:

- Information included in analysis (example)\*:
  - Organization's name, website, mission statement, board of directors (names + titles), location (HQ and programmatic), target demographic, major donors, annual budget, organization's ratings (GuideStar + Charity Navigator)
  - Competition list and breakdown of their donors, when funded, and amount received
  - Matrix comparing how many donors fund the same organizations and in what years
  - Total amount received for each 'competition' donors (per year).
- Delivery product: Final Excel spreadsheet with data + Word doc of key findings and analysis
- Access to Analysis spreadsheet template and final product (Excel)
- One-hour conference call to review data and recommendations for next-steps.
  - Note: information to *only* include five (5) organizations. Selected organizations will be agreed upon with client before research project is conducted. Additional organizations can be added but charged at \$70/hour rate.
    - \*The analysis spreadsheet template alone can be purchased (Option D)

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### Option D) Organization Analysis Template: \$125

Purpose: Want Option C but don't want to spend \$1,700? Impetus Impact can provide the spreadsheet template used in Option C. Option D is ideal if you have the capacity to research and fill in the information internally. Spreadsheet contains multiple tabs to collect diverse data to inform your foundation on each potential grantee.

#### What you get:

- The spreadsheet template (Excel), unlocked, with samples included so you know what to each tab is asking for
- 30-minute conference call to answer any questions

\*This can be altered per client's request