

Megan Reed
EBIA Development Scope of Work
October 7, 2019

TIMEFRAME:

OCTOBER 2019 TO JUNE 2020

OVERARCHING FUNDRAISING GOAL:

\$250,000

WEEKLY COMMITMENT

UP TO 20 HOURS PER WEEK, REMOTE, CONSULTANT BASIS

DELIVERABLES:

1. Create a development process for and pipeline consisting of:

- a. A robust list (40) of targeted prospects with background research on each (5 per month)
- b. A prioritized list of prospects for cold approach/cultivating discussions with foundations (with template email language for each. (Depending on funder, these can come from Megan, Michelle, the principal and/or a board member. The goal is to begin discussions and relationship-building to cultivate project/funding alignment discussions; often the actual discussions will be with the primary school contact, i.e. the principal). (2-3 per month)
 - Maintain tracking of these approaches, follow-ups and calendar for next steps/approach
- c. Ongoing pipeline of submitted grants for unsolicited/open funding calls in a range of funding amounts, from \$10K+ (target 2-3 grants per month, depending on the scope and breadth of requirements).
- d. For secured grants, coordinate project grant launch meetings for all involved staffers, create a calendar for reporting follow-ups, complete narrative reports and secure financial reporting for those due.

2. Create background/overview materials for grants (one and two pagers; theory of action (if needed) and any case studies)

3. Maintain an online archive for development materials and submitted, pending & approved grants (via Google drive, Dropbox, or other platform)

4. Hold weekly development update meetings via phone with CFO and monthly development meetings/check-ins via phone with principal and CFO to determine funding priorities/needs/projects, check-in on progress, next steps and follow-ups.

5. Help coordinate, track and participate in funder meetings via phone with CFO, Principal, etc and debrief on next steps as needed.

6. Coordinate and project manage internal research meetings for cultivation of grant proposals and associated deliverables with project leads/experts, depending on scope.

7. Help craft fundraising campaign messaging/plea (digital or mailed letter) with marketing/communications contact (timing TBD--could be end of year or end of school year). Track donations from plea and manage issuance of tax donation letters (if needed).