

LET'S SERVE!

IOANED EXECUTIVE SERVICE DELAN

comprehensive approach to resource development

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About SERVE-U

Serve University (known as, SERVE-U) is a professional training and development institute for nonprofit leaders who want to learn how to serve their communities more abundantly. Our student population is diverse from emerging nonprofit leaders to the experienced executive director.

SERVE-U is two-fold. SERVE-U provides an *online certification program for grant writers and nonprofit leaders*. Our digital campus is like "Netflix for Nonprofit" where student can selfpace through video tutorials and download ready-to-use templates accessible 24/7.

SERVE-U Loaned Executive Services consists of a guild of veteran grant writers and SME's (subject matter experts) in their respective field, providing "loaned" services to create, stabilize, and sustain your organization's resource development priorities.



SERVE-U will serve as the *resource development firm* with the your organization to establish an efficient process to establish and sustain your emerging resource development department until your organization has filled full-time, part-time, and consultant positions.

SERVE-U has the ability to spearhead your organization's resource development needs and create a sustainable department that provides an seamless transfer of responsibilities to new talent.

SERVE-U will lead the efforts to secure grants from public, private, and government grants for annual operations, programs, special projects and capital purchases for a diverse portfolio of funding opportunities.

In doing so, SERVE-U will help broaden the organization's resources by identifying and cultivating funding opportunity with an emphasis on economic development by bridging current social service fundraising efforts.



SERVE-U Vision, Mission + Goals

Serving tax-exempt organizations that are seeking fund development, grantsmanship, and nonprofit consulting, SERVE-U fills a niche in the philanthropic and government sector for some of our most valuable organizations and their leaders.

SERVE-U is an agency that has built upon its reputation in the community with clients coming from referrals. Partnerships are the cornerstone of SERVE-U's success.

Since 2016, we've added many new clients to the SERVE-U community, bringing the total numbers of funds raised and managed to more than \$1 Billion and counting.

SERVE-U Loaned Executive Service Plan

CAPACITY BUILDING FOR A COMPREHENSIVE RESOURCE DEVELOPMENT DEPARTMENT

The SERVE-U Loaned Executive Service Plans provide fractional or **loaned** executive support to nonprofits, by creating and sustaining your resource development department.

Service Plans are customized for each unique nonprofit.

Flexible partnership terms are from 90-days to six months.

Service plans includes:

Our team of experienced philanthropy professionals are ready to SERVE your nonprofit. Each service plans comes with up to four (4) Loaned Executives to serve as your interim Resource Development Department:

- Director of Development
- Resource Development Officers
- Grant Writer + Editor
- Curriculum Writer
- Nonprofit Consultant
- Nonprofit CPA
- Nonprofit Attorney



Loaned Executives available:

- Director of Development
- Resource Development Officer
- Nonprofit Consultant

Infrastructure services include:

- Create and manage the resource development team
- Create protocols and processes for resource development department for onboard training and orientation for new talent:
- Review and make recommendations to your Fundraising Plan with key staff or board members for a clear understanding of the agency's future goals and achievable benchmarks
- Meet with the key leadership, program managers, and CFO to review the operating budget, grant financial compliance, and funding disbursements
- Create a Funding Flip Book for Board of Directors to identify community assets
- Connect with your accounting department to ensure financial processes are in place to track grant funding
- Development Coordination
- Create a Resource Development and Grant Writer Manual
- Donor Acknowledgement Process
- Draft MOUs with Community Partners

FEASIBILITY ASSESSMENT + DESIGN THINKING

Loaned Executives available:

- Director of Development
- Resource Development Officer
- Grant Writer

Assessment and Project Assignments for resource development activities:

- Contribute to the ongoing conversation about your nonprofit's innovative projects and partnership opportunities
- Identify new opportunities by conducting a *Feasibility Assessment* with leadership to determines funding priorities
- Audit and evaluate current program and fundraising system-setting to create benchmarks funding goals, deadlines, and reporting cycles
- Design thinking by nonprofit team members in various departments and to institute tracking measurement and outcomes for grant reporting
- Make recommendations to the agency's marketing collateral to attract potential and current funders

Loaned Executives available:

- Director of Development
- Resource Development Officers
- Grant Writers + Editor

GRANTSMANSHIP

Grantsmanship Services include:

- Lead fundraising activities as directed by Executive Director and Board of Directors
- Draft grant narratives and program budgets in alignment with funder priorities
- Connect with funding agencies to ensure fluid communication
- Grant Mining for new and existing grant opportunities
- Renewal grant applications and grant reporting
- Develop and/or review previously submitted grant applications, reporting schedules, financials, and operating budget
- Grants and Contract management & bid schedules, site visits, grant-funded payroll
 & time sheets, and other various duties per grant requirements
- Grant Submittal to funder in timely basis
- Interim and Final Reporting
- Lead weekly resource development team meetings
- Attend Technical Assitance and Public Hearning Meetings

COMPREHENSIVE RESOURCE DEVELOPMENT PLAN

The Comprehensive Resource Development Plan activities include:

- Create a 18-month Comprehensive Resource Development Plan
- Resource Development Retreat + Workshop Training
- Spearhead the design thinking process of the comprehensive resource development plan
- Create project strategies and add value to the exiting or new programs
- Make recommendations to programs and reporting outcomes
- Recommend community partners and tracking mechanisms for best practices
- Provide nonprofit recommendations to enhance programming to become more attractive to the philanthropic community as it relates to grant funding opportunities

Loaned Executives available:

- Nonprofit Consultants
- Resource Development Officers

BOARD OF DIRECTORS TRAINING + **FUNDRAISING DEVELOPMENT**

Loaned Executives available:

- Nonprofit Consultants
- Resource Development Officers

Board of Director Training + Fundraising Development includes:

- Bi-weekly sixty minute mentoring session with Board Chair and selected board and committee members to discuss success strategies for board building and capacity
- Recorded replay of video conferences to share with your board members and other constituents
- Conduct a Nonprofit Checklist to ensure nonprofit is operating in full compliance
- Provide a brief revision of Program Description and Program Budget
- Create a \$250,000 Fundraising Plan for board of director implementation
- Facilitate one (1) Board Meeting where members will vote on updates and amendments to program scope
- Retreat planning for board planning and training

NONPROFIT COMPLIANCE + **ADMINISTRATIVE SERVICES**

Nonprofit administrative services include:

- Spread head executive search for full-and-part time resource development staff
- Nonprofit Checklist of Administrative documents needed for Tax-Exempt Compliance
- Financial services including audit and bookkeeping
- Grant submittal web portal registration
- Annual Business and Charitable Licenses + Vendor Registration
- Support with filing annual Form 990
- Managing the Letters of Support process
- Drafting MOUs with partners
- Donor Database Management
- Notary Public

Loaned Executives available:

- Resource Development Officers
- CPA (if needed)
- Attorney (if needed)

SERVE-U Loaned Resource Development Service Plans

Six-month Service Plan for organizations with operating/program budgets of \$50K - \$3 million

2020 FEE SCHEDULE



Operating/Program Budget range:	LEVEL A	LEVEL B	LEVEL C
	\$50K - \$150K	\$150K - \$499K	\$500K - \$3M
INFRASTRUCTURE	\$9,000	\$12,000	\$30,000
	\$1,500/mo.	\$2,000/mo.	\$5,000/mo.
FEASIBILITY ASSESSMENT +	\$7,500	\$12,000	\$18,000
DESIGN THINKING	\$1,250/mo.	\$2,000/mo.	\$3,000/mo.
GRANTSMANSHIP	f 2.222	f7.4.000	# 40.000
GRANT WRITER (renewal)	\$9,000	\$36,000	\$60,000
	\$1,500 mo.	\$6,000/mo.	\$10,000/mo.
GRANT WRITER (new)	\$18,000	\$36,000	\$60,000
	\$3,000/mo.	\$6,000/mo.	\$10,000/mo.
GRANTS MANAGEMENT	\$9,000	\$12,000	\$30,000
	\$1,500/mo.	\$2,000/mo.	\$5,000/mo.
COMPREHENSIVE RESOURCE			
DEVELOPMENT PLAN 90-day service plan, or can be added to an existing 6-month service plan	\$10,000	\$15,000	\$25,000
	\$1,667/mo.	\$2,500/mo.	\$4,167/mo.
BOARD TRAINING + FUNDRAISING DEVELOPMENT 90-day service plan	\$5,000	\$7,500	\$10,000
	\$1,667 3 pymts	\$2,500 3 pymts	\$3,333 3 pymts
NONPROFIT COMPLIANCE + ADMINISTRATIVE SERVICES	\$9,000	\$9,000	\$9,000
	\$1,500 mo.	\$1,500 mo.	\$1,500 mo.



SAMPLE ANNUAL PAYROLL
BUDGET FOR RESOURCE
DEVELOPMENT +
PROGRAM TEAMS

LEVEL D FULL SERVICE PLAN

\$460,000 annual

- 240 per week
- Eight (8) FT+PT employees
- \$20K \$25K Bi-weekly Payroll
- Healthcare + Benefits
- Development Director (\$90K)
- Development Officer (\$60K)
- Grant Writer (\$55K)
- Program Director (\$60K)
- Program Coordinator (\$40K)
- Volunteer Coordinator (\$40K)
- COO/HR (\$55K)
- Accountant (\$60K)

\$288,000 annual

- Billed at 30 hours per week
- \$12K Bi-Weekly Payroll
- Bi-Weekly payment plan
- Four (4) Loaned Executives completing the work of 8 employees
- Professional Development
 Trainings for BOD + Staff (2)
- Subscriptions + Memberships
- Full Scope of Services upon confirmation of services
- Renewal contract up to 2 years*

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SUGGESTED SERVE-U SERVICE PLANS

12-month Service Plans:

1. Comprehensive Resource Development Plan (\$10K)

2. Grantsmanship (new, renewal, management) (\$36K)

3. Feasibility Assessment + Design Thinking (\$7,500)

4. Board Training + Fundraising Development (\$5K)

Market Rate:

Bundle Rate (20%):

\$58,500 \$9,750/mo. \$46,800 \$7,800/mo.

	BUDGET A	BUDGET B	BUDGET C
Annual Resource Development Department Budget range		\$50,000 \$1,000/wk.	\$75,000 \$1,500/wk.
INFRASTRUCTURE	Fractional	Fractional	X
FEASIBILITY ASSESSMENT + DESIGN THINKING	Fractional	Fractional	X
GRANTSMANSHIP		ш	
GRANT WRITER (renewal)	all grants in current portfolio as of 12/31/19*	all grants in curren portfolio as of 12/31/	
GRANT WRITER (new)	3-4 grants* up to \$250K	6-10 grants* up to \$500K	X*
GRANTS MANAGEMENT	X*	X*	X
COMPREHENSIVE RESOURCE			
DEVELOPMENT PLAN 90-day service plan, or can be added to an existing 6-month service plan		X	Χ
BOARD TRAINING + FUNDRAISING DEVELOPMENT 90-day service plan		Fractional	X
NONPROFIT COMPLIANCE + ADMINISTRATIVE SERVICES		Fractional	X

^{*}Services that are noted *Fractional* are mutually pre-determined by both parties after the initial resource development assessment

^{*}Mutual pre-determined new grant application



James Bailey, CEO - Herman J. Russell Center for Innovation and Entrepreneurship (RCIE)

Lyrika Holmes, Executive Director - Artz for the Harp

Ebony Harris, CEO - Youth Empowerment Success Services (YESS!)

Dr. Felicia Wilson, Professor - Saint Leo University

SERVE-U Loaned Executive Team

AN INTRODUCTION TO OUR RESOURCE DEVELOPMENT TEAM

Founder + Professor

Brandi Rae Hicks Ed.D.(c)

Grant Writer

+ Researcher

Kelly Walton Ed.D.

Grant Writer

+ Editor

Katherine Lacksen

Project Coordinators

Three Fellows are paid college/graduate interns

CPA + Nonprofit Accountant

Kim Maxwell, The Accounting Firm, LLC.

Legal Counsel

Roxann Smithers, Smithers + Ume-Nwagbo, LLC.

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