



Off and Running Fundraising Consulting empowers non-profit organizations to improve fundraising efforts and outcomes. Founder, Carrie Grote has been a development professional for 20 years and specializes in donor development and fundraising systems incorporating Little Green Light software as her preferred CRM.

Since 2014, Carrie has worked with hundreds of non-profit organizations across the country and internationally to perform Little Green Light data migrations, as well as the creation of custom LGL Forms, integrations with 3rd party platforms, and targeted training sessions. She is based in Asheville, NC.

Proposal for Fundraising Consulting Services for:

Fox Valley United Way

The following services are proposed:

1. Data review and clean up (\$1800)
 - a. Hold a kickoff call to discuss data migration process and set up the timeline.
 - b. Review ANDAR data (provided by the client).
 - c. Reorganize and clean data so it is consistent with best practices and the reporting structure of LGL, as well as any agreed upon customization.
2. Data importing (\$1600)
 - a. Import data into LGL.
 - b. Resolve obvious duplicate records.
 - c. Run reports to narrow down possible records to remove from LGL.
 - d. Hold a review call after all data has been imported.
 - e. Make final structural adjustments to the data in LGL.
3. Onboarding (\$950)
 - a. Hold three 1-hour training sessions.
 - b. Online giving - create and integrate an LGL donation form.
 - c. Format and upload acknowledgment letter templates.
 - d. Run 3-5 sample custom reports based on client's needs.
 - e. Hold a final wrap-up call.

Ongoing support is available at the rate of \$150 an hour.

Cost of contracted services:

- *Date of proposal = 3/20/2025 (proposal valid through 7/20/2025)*
 - *Total cost = \$4,350*
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References:

- Elizabeth Gromko, United Way of Snohomish County (WA), elizabeth.gromko@uwsc.org
- Keren Fraiman, Spertus Institute for Jewish Learning & Leadership (IL), kfraiman@spertus.edu
- Michael Oliveria, Fisher College (MA), moliveira@fisher.edu

Full client list can be viewed at www.offandrunningconsulting.com