

LOCKMAN & FABIAN

Fundraising, Finance and Organizational Development Leadership

Capabilities Statement

About Us

Established in 2013, Lockman & Fabian is a boutique consulting practice founded on a desire to provide high-level, solution-driven services to the philanthropic and non-profit sector. L&F offers a wide range of customized services. Each engagement is tailored to the client's needs and optimized for both functionality and bottom-line enhancement. Our clients include trade, membership, charitable, educational, and direct service organizations as well as private foundations.

L&F has successfully completed varying projects on time/on budget for over 25 organizations – all of whom have expressed satisfaction with our work performance and the quality of completed work. The fact that many clients have recommended us to others or have engaged us for additional or ongoing services demonstrates a high level of satisfaction with our overall engagement.

Examples are: DART, Operation Lifesaver, Global Peace Foundation, The McKnight Foundation, Dyson Foundation, Fionta, Alterisic, International Labor Rights Forum, National Organizations for Youth Safety, Digital Promise Global, Bay Business Group, Kositzka Wicks, and Cooperative Development Foundation.

Contact Us

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CORE SERVICES

- **Private Foundation Accounting and Database Systems Analysis:** Present options that accomplish internal controls, regulatory compliance, operating efficiency, and safeguarding of assets. Translate various requirements affecting philanthropic entities into database and finance systems that fulfill reporting and management obligations. Assure integrity of work-flow processes.
- **Data Management, Analysis and Reporting:** Assessment of client needs among conference and event management, donor database, direct marketing, online campaigning, grantmaker and membership functions, certification process, etc. Create database frameworks to track collective impact across programmatic portfolio as well as analysis of evaluation and outcomes data. Present best-in-class solutions, implementation plan, and migration management.
- **Government and Multilateral Grants Administration and Proposal Development:** Proposal development including logic model, evaluation and measurement indicators framework designs, budget, and staffing designs. Meet federal accountability requirements set forth in 2 CFR 2. Establish an indirect cost rate with cognizant federal agency. Comply with terms and conditions of the project including performance and reporting provisions, documentation and oversight provisions, and other legislative and regulatory provisions.
- **Fundraising and Finance Operational Assessment:** Assess current organizational performance including key areas of concern. Identify ways to improve fundraising and financial functionality. Outline recommendations to advance client strategic interests. Present the client with an array of options, implementation plan, and ongoing advisement

RECENT PROJECTS / CLIENTS

- **Systems assessment, analysis, and recommendations** for upgrading financial accounting and related software for The McKnight Foundation and Dyson Foundation;
- **Implemented Intacct and Financial Edge product solutions** migration by leading the transition, set-up, and data mapping as well as driving forward on task completion for the McKnight and Dyson Foundations;
- **Assessed, recommended, and implemented on a new CRMs** such as Salesforce, Raiser's Edge and other products with data migration, website with membership functions, and satisfied information output needed for accounting functions for American International Recruitment Council and various clients;
- **Indirect Cost Rate proposals** to Department of State, National Science Foundation, and Department of Education for various clients;
- **OMB Federal Award compliance policies and procedures** for International Labor Rights Forum, Alteristic, Operation Lifesaver, and Digital Promise Global;
- **Proposal Development / Evaluations** for Dept. of Homeland Security, State Department, Dept. of Transportation, and Rutgers University Walter Rand Institute funding opportunities as well as grant administration;
- **Operational assessment and recalibration of Fundraising and Finance** functions as well as ongoing strategic advisement for United Community Ministries.