



SERVICES OVERVIEW

Removing Operations Bottlenecks to Impact



(443) 379-4105



deena@workstreamnonprofit.org



workstreamnonprofit.org

How We Help

WorkStream Nonprofit handles the operational work that keeps an organization running. We can own one defined area, like bookkeeping or hiring, or direct the entire operation the way a COO would. For groups that don't yet have their own 501(c)(3), we can serve as a legal home. Five service areas cover that range.



Financial Management

We run the full bookkeeping cycle and deliver financials every month, so your board and funders always see current numbers. Annual filings, including the 990, are handled well before they're due.



Operations Support

We take on the daily work that keeps your organization moving, from calendar and inbox management to grant reporting, project work, and recruiting and hiring. Your leadership gets its hours back to focus on the mission.



Fractional COO

We come in as an operations team, covering finance, compliance, hiring, and strategy. Your organization gets senior leadership without a full executive salary and a support team to help your staff focus on what matters.



Fiscal Sponsorship

Operate under our 501(c)(3) and accept tax-deductible funds right away, with bookkeeping, compliance, and reporting handled under our umbrella. We also help you stand up your own entity when you are ready.



Training and Coaching

We assess your operations and then run training to help you strengthen them. Programs range from a short diagnostic to a six-month cohort with peer organizations, and your staff keeps the skills long after the program ends.

Pick one service or combine as needed for a personalized package.

workstreamnonprofit.org

Financial Management

We run the full bookkeeping cycle, from daily transactions through annual filings. Your board and your funders see current, donor-ready numbers every month.

When this fits:



Bookkeeping takes more hours than you can spare.



Month-end reporting is a scramble.



You reconstruct a year of records every filing season.



You make financial decisions with no one to check them.

What It Looks Like



Bookkeeping

We record and reconcile every transaction against a chart of accounts we standardize from the start.



Monthly Reporting

We deliver budget performance, profit and loss, and aging receivables every month.



Filings and Compliance

Your 990, state filings, 1099s, and 1096s go out on time, with an annual compliance review.



Expert Access

Bring your questions to a business expert for an hour each month, at every plan level.

Financial Management: Pricing

We price on transaction volume and budget size. Everything on the previous page is included at every tier, with a one-time onboarding fee to get your books current. Find your monthly transaction count or budget size in the first column.

Monthly Transactions/Budget/	Onboarding Fee	Onboarding Period	Meeting Frequency	Monthly Cost	Annual Filing
< 20 / \$100,000	\$700	1 Week	Monthly	\$350	State, 990
20-50 / \$100 - 300,000	\$1,200	2 Weeks	Monthly	\$600	State, 990
51-80 / \$300-500,000	\$1,600	2 Weeks	Monthly	\$800	State, 990
81-150 / \$600,000-1M	\$2,200	2 Weeks	Monthly	\$1,100	State, 990
151-250 / \$1-2M	\$3,000	3 Weeks	Bi-weekly	\$1,500	State, 990
251-500 / 3-10M	Contact for details to evaluate fit.				
>500 / \$10M+	Not supported.				

***Data cleanup costs, or other non-included bookkeeping tasks are billed separately at \$120/hour.*

***Grant reporting is not included. We do provide financial reports and numbers as needed for any reports.*

***Price may be subject to adjustment dependent on amount of grant tracking required.*

Operations Support

One team provides support at every level, from daily help to operational leadership. We bring in the right people for each task, so you get the support you need while keeping costs low.

When this fits:



You spend your best hours on your calendar and inbox.



Good ideas stall because no one has time to execute them.



Finance and compliance fall to whoever has a free hour.



You carry operational leadership alone.

What It Looks Like



Level 1, Essential

An assistant who knows your organization handles your calendar, inbox, travel, CRM, and document prep.



Level 2, Advanced

Grant reporting and project management move to us, along with comms and recruiting support.



Level 3, Finance, Compliance, and Hiring

We manage payroll, benefits, and financial support, and lead state and federal compliance. Technology implementation sits here too, with a dedicated hiring lead and complex grant writing.



Level 4, Business Management

A Fractional COO or Operations Director joins your leadership, bringing business coaching and operations consulting.

Operations Support: Pricing

We bill hourly based on the service provider performing the work, so one engagement can draw on several levels in the same month. Committing to a monthly minimum lowers your rate across every level.

Level	What's Included	Rate
1. Essential	Calendar, inbox, travel, CRM, document prep, scheduling	\$45/hour
2. Advanced	Grant reporting, project management, comms, recruiting	\$80/hour
3. Finance, Compliance, and Hiring	Payroll, compliance, technology, hiring lead, grant writing	\$120/hour
4. Business Management	Fractional COO, operations director, coaching, consulting	\$250/hour

Monthly Hour Commitment

21-40 hours	5% off
41-60 hours	6% off
61+ hours	7% off

Outside this Scope

HR and people management, bookkeeping, content creation, technical support, and in-person errands, unless we agree otherwise.

Fractional COO

We come in as an operations team with the structure and experience to execute from day one, covering finance, hiring, and strategy as your organization grows.

When this fits:



Your systems can't keep up with how fast you're growing.



Financial and compliance work outpaces your bandwidth.

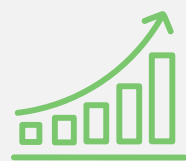


Hiring and team-building need dedicated leadership.



You want a partner at the leadership table.

What It Looks Like



Business and Ops Consulting

We coach your leadership and consult on operations, keeping strategy and execution connected.



Finance and Compliance

Financial support, payroll, and benefits sit with us, along with state and federal compliance.



Hiring Leadership

A dedicated hiring lead runs your searches, and a grant writer on our team takes on complex grant proposals.



Dedicated Fractional COO

You get Operations Director-level leadership, scaled to your organization's needs.

How a COO Engagement Runs

Most engagements run three phases over about two months, and we lead your operations throughout.

About 1 month

Phase 1

Workflow Analysis and Design

We interview your staff and stakeholders, review your systems and technology, and map how work moves through your organization.

You Receive:

Workflow maps, technical specifications, job descriptions, and an assessment report.

About 2 weeks

Phase 2

Implementation and Transition

We put the new processes in place and establish the operating rhythms that hold them: team meetings, one-on-ones, reviews, and KPI tracking.

You Receive:

Working systems, meeting templates and cadences, and a KPI framework.

About 1 week

Phase 3

Performance and Compliance

We find the performance and compliance gaps left across your operations, bring in the right resources, and close them.

You Receive:

A gap analysis and a remediation plan we carry out with you.

Fractional COO, from day one through the end of the engagement

We lead your operations staff, hold the accountability systems and KPIs, secure resources ahead of need, and oversee compliance, finance, and technology.

Fractional COO: Pricing

Every COO engagement is built around one organization, so we quote rather than list a price. Two things set the number, and we walk through both with you before anything is on paper.

What Sets Your Quote

How many COO hours your organization needs each month

Which supporting roles we staff alongside the COO

What a Package can Include

- ▶ Fractional COO leadership
- ▶ Executive assistance
- ▶ Bookkeeping and reporting
- ▶ Hiring and recruiting
- ▶ Systems and CRM setup
- ▶ Grant writing support

You pay one monthly figure for the whole team, not separate rates per role.

Engagements generally begin at \$4,000 per month.

To build your quote, we will ask about your budget, your staff, and the functions you want covered.

Fiscal Sponsorship

We become your legal home and your back office, so you can operate and accept tax-deductible funds right away while you build toward your own entity.

When this fits:



You want to accept funds now, before your own entity exists.



Standing up a 501(c)(3) alone would take time you don't have.



Compliance would pull you away from your program.



This is your first organization and you want guidance.

What It Looks Like



A 501(c)(3) Home

Operate under our 501(c)(3) and accept tax-deductible donations from day one. Your program runs under our 501(c)(3), so donors can give before your entity exists.



Coaching and Guidance

We walk you through the decisions that come with running a new organization, from governance to daily operations.



Embedded Back Office

Your bookkeeping, compliance, and reporting happen under our umbrella, laying the foundation your own 501(c)(3) will stand on.



A Path to Independence

When you are ready to graduate, we file for your own 501(c)(3) and transfer everything we have built.

Apply:

[Fiscal Sponsorship & Advisory Programs](#)

Fiscal Sponsorship: Pricing

Each band of funding you raise carries a lower rate than the one before it. You never pay the opening rate on your whole budget, and the more you raise, the less you pay on every dollar after that.

How it Works on \$400,000 Raised

12% on the first \$250,000	\$30,000
11% on the next \$150,000	\$16,500
Total for the Year	\$46,500
An effective rate of 11.6%	

Annual Minimum

\$15,000 in year one and \$12,000 each year after, charged only when the banded fee comes in below it.

Rate by Band

The first \$250,000	12%
\$250,001 to \$500,000	11%
\$500,001 to \$750,000	10%
\$750,001 to \$1M	9%
Everything above \$1M	8%

Included at Every Level

Incubation support and the work of standing up your own entity, never billed separately.

Training and Coaching

We assess where your operations stand, then run the training that gets you where you need to be. Your team keeps the skills long after the program ends.

When this fits:



You know something is slowing you down but not what



Your team learns new systems and then drifts back



You are preparing to grow and want the foundation first



You want to build capacity in your own staff

What It Looks Like



GRIP: Growth Readiness Improvement Program

A 90-minute diagnostic of your workflows, staffing, and governance, followed by three guided sessions on your highest-impact changes.



Nonprofit Operations Accelerator Program

A six-month cohort with peer organizations, combining expert workshops with monthly coaching and hands-on implementation.



Power Coaching

Regular sessions with an expert coach, focused on the operational challenges you are facing and the leader you are becoming.



Self-Guided Courses

A growing library of courses on the operational areas every nonprofit has to get right, each with practical checkpoints.

Apply:

[GRIP](#)

[Operations Accelerator](#)

Training and Coaching: Pricing

Each program carries a flat price for the full engagement, with no hourly billing. Cohorts run on set start dates and admit a limited number of organizations, while the one-on-one formats open year-round.

Program	What it includes	Investment
GRIP	90-minute assessment, findings report, three guided improvement sessions, growth roadmap	Free, limited slots \$950 to skip the waitlist
Operations Accelerator Cohort format	Six months with five peer organizations, monthly expert workshops, coaching sessions, operational blueprint	\$2,800 up to two participants
Operations Bootcamp One-on-one format	The same curriculum delivered privately across six sessions, built around your organization	\$1,750 open year-round
Power Coaching	One-on-one sessions with an expert coach on the challenges in front of you	Contact for pricing
Self-Guided Courses	Operations Health Check series and Built to Be Funded, both self-guided	Free now \$199 from September 2026

A ten percent need-based scholarship is available for the Accelerator and the Bootcamp. Ask us if cost is the only thing standing in your way.

workstreamnonprofit.org

The Nonprofit Lifecycle, and Where We Fit

Every organization moves through the same four stages on the way to running independently. You can bring us in at any one of them, and the support changes to match where you are.

1

Inception

The idea takes shape, along with the mission, plan, and budget.

2

Fundraising

You own the funder relationships and the grant applications.

3

Entity Startup

You choose between your own 501(c) (3) and a fiscal sponsor.

4

Operating

You operate independently, and we're still here when you need us.

Where We Come In

Coaching while you shape the mission, the plan, and the budget behind it

Grant writing support, plus a 501(c) (3) home so you can accept funds now.

Entity setup and filings, or fiscal sponsorship while you build toward your own.

Financial management, executive assistance, and a Fractional COO as you grow.

You can start with us at any stage.

workstreamnonprofit.org

Build Operations that Support Your Mission



You're Ready When

- ▶ You want a partner who owns outcomes.
- ▶ Your team is stretched and ready for support.
- ▶ You value structure and follow-through.
- ▶ You are building toward long-term sustainability.

30% or more added impact on the same budget.

“...Deena has supported our organization in streamlining workflow processes and, as a result, saved us over 1,000 employee hours per year...”

Marie Schell,
Conflict Resolution Center of Baltimore County



(443) 379-4105



deena@workstreamnonprofit.org



workstreamnonprofit.org