



**SWEET GRASS
CONSULTING**

Data doing good.

Technical assistance & database support

Get the most out of your system
and move toward total control
of your data



PROACTIVE SUPPORT FOR IMPROVED DATA SYSTEMS

Nonprofit and Native CDFI leaders deserve partners who are responsive to their needs and priorities.

Partnership drives our approach, and our service model reflects how we show up in relationship with your organization. Some teams have strong internal capacity and need targeted expertise. Others want a thought partner to help champion the work. Others want more involved monitoring, reporting, and system stewardship. In any scenario, our goal is to provide your desired level of consistent and regular support to help your team adopt and fully leverage your data system.



What's inside our 3 service packages

You'll get ongoing support and incremental enhancements to your system, so your team has more time to serve your clients and community.



Larger modifications and system builds aren't included.
Please contact us for more information.

WITH EVERY SERVICE PACKAGE, YOU'LL RECEIVE WEEKLY, DEDICATED TIME FROM SWEET GRASS.

This includes regular one-on-one calls with you, as well as time spent on the tasks that keep your system running. Our weekly cadence provides consistent, steady progress that promotes system health and proactive planning.

All services include:

- Ongoing Salesforce admin and system support
- Structured weekly support hours
- Regularly scheduled meetings
- Clear prioritization and request management
- Annual review of scope and pricing
- Searchable and accessible documentation

Deliverables can include:

- Configuration updates
- Field and object modifications
- Workflow and automation adjustments
- Reporting and dashboard refinement
- Data cleanup guidance
- User management
- General system troubleshooting

Choose your level of personalized support

1 Advisory support

\$16,800 annually
2 hours/week (8 hours/month)

Designed for organizations who need steady system maintenance and light optimization. Best for teams with an established Salesforce system who require a low level of admin and troubleshooting support. If you've already identified an internal "power user" who only needs occasional assistance, this is the service for you.

Key features include:

- 2 dedicated service hours per week
- Regularly scheduled check-in meetings
- Access to online documentation and SOP resources
- Ongoing system stabilization and incremental improvements

2 Strategic support

\$21,000 annually
2.5 hours/week (10 hours/month)

Created for organizations seeking system support, a concrete partnership, and help with reporting. This service will help you use Salesforce data for active storytelling, impact communication, and funder reporting. Best for teams with limited Salesforce capacity who require additional support for monitoring and stewardship.

Includes key features of Advisory Support plus:

- An additional 30 minutes per week (2.5 hours/week total)
- A one-page marketing flyer based on available data reports and dashboards
- Regular monitoring of data accuracy and system usage

3 Embedded support

\$29,400 annually
3.5 hours/week (14 hours/month)

Built for organizations who rely heavily on Salesforce for performance management, reporting, and external communication. Best for teams who need a hands-on, proactive partner to help refine data quality, improve performance reporting, and develop long-term system strategy.

Includes key features of Strategic Support plus:

- An additional 1 hour per week (3.5 hours/week total)
- Data entry and importing support
- A comprehensive, 2–3-page impact report based on available reports and dashboards
- Recommendations for future system use and roadmap planning



World-class assistance in developing systems, reports, and templates that have tremendously added to the success of launching our online platform to manage kahiau.

—Danielle Chavez, Council for Native Hawaiian Advancement

Service features and terms

Dedicated service hours

Weekly service hours are focused, dedicated time from your Sweet Grass project lead. Total hours include one-on-one calls with you, as well as time spent on the tasks that keep your system running. This weekly cadence provides consistent, steady progress that promotes ongoing system health and proactive planning.

Additional hours and rollovers

Hours do not accrue beyond monthly service allocations and cannot be rolled over. If your needs exceed your monthly allocation, you may purchase additional hour banks on an as-needed basis. Major new projects or system builds will be scoped separately with newly defined timelines and budgets. Allocated hours are intended to be used consistently throughout the month. Requests to use all

allocated hours within a short time period may be denied.

Submission requests and prioritization

TA services are most effective when organizations make clear trade-offs and decisions. To ensure clarity and efficiency, new requests must be prioritized against existing work. When new urgent requests arise, clients must actively re-prioritize other tasks.

Regular meetings and communication

Regular meetings are included in every service level and are central to success. They are used to plan and pace work, and to clearly prioritize and monitor tasks. We use meetings to review priorities, provide progress updates, address barriers, answer questions, and confirm decisions.

Shared trust and responsibility

As part of a TA services agreement, you'll receive:

- Proactive system stewardship
- Clear communication
- Structured pacing
- Documentation
- Capacity building
- Strategic insight
- Accountability to weekly commitments

In return, you'll provide:

- Clear direction and participation
- A commitment to the system and the role of evaluation
- Standard system support

Our TA services provide ongoing, basic support and incremental enhancements only. This includes technical support, troubleshooting, error fixing, user management

assistance, staff training, system edits, strategic support, reports and dashboard help, and basic integrations.

Exclusions

Large, full-scale initiatives are not included in TA services and require a separate scope, timeline, and budget estimate.

Examples of excluded services:

- New program or process builds
- Major automation overhauls or implementations
- New complex integrations
- Major data imports, exports, or migration projects
- System redesigns
- Architecture replans
- Process mapping

Systems that grow with you, adapting to changes over time

Learn more at sweetgrassconsulting.net/implementation
or contact us at implementation@sweetgrassconsulting.net.



SWEET GRASS
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Sweet Grass is the impact partner strengthening communities with data services to actualize their own interests, values, and priorities. We partner with tribal, nonprofit, and mission-driven organizations to deliver and measure meaningful outcomes.

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