



Bearing Tree

“Making it easier to make a difference”

Company Overview

OUR MISSION



Our mission is to provide our partners with a simple approach to professional support services. We bring expertise, proven processes, advanced technology and great care to your nonprofit organization. We make sure the operational details of running a mission-focused organization are addressed, so you can focus on changing the world.

OUR VALUES

● Mission-Driven

We work with partners who, like us, are striving every day to create a better country and world

● Collegial

We develop productive, enjoyable and lasting relationships that greatly enhance the value we deliver – and get – from our work

● Professional

We deliver world-class expertise and industry-leading technology to provide superior quality, value and service in all we do

● Trustworthy

We recognize the importance and sensitivity of the nature of the work we do with our partners, and we strive to do the right thing, all the time

● Dedicated

We are fully committed to our mission of “making it easier to make a difference” and understand the critical role we play in our partners’ success

● Grateful

We are thankful and humbled to have our abilities multiplied in driving positive impact across an array of incredibly worthy causes

WE BELIEVE

We believe in the power of the American people to come together to solve problems and self-govern.

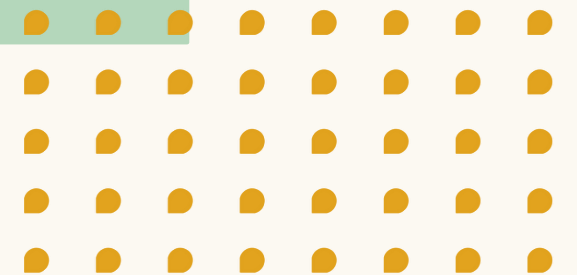
Our partners work every day to solve important problems that directly impact the quality of life for all Americans. Our team specializes in essential strategic, administrative and development support services that enable our partners to focus on their critical missions.

We work with organizations that are driven to improve education, health care and safety in our communities. We stand with our partners as they work to strengthen our military, embrace family values and protect religious freedoms in the United States – and throughout the world.

OUR VALUE PROPOSITION

We bring nonprofit expertise and economies of scale to your organization. Our team delivers best-in-class administrative and fundraising support. We are passionate about our work and your mission.

We make it easier for you to **compete for top talent, raise more money, and achieve your mission.**



SERVICE AREAS



Payroll & Benefits

We provide a full suite of competitive benefits to your staff and handle all payroll support from onboarding to offboarding.



Finance & Accounting

We manage all financial transactions, reporting, audits, and filings. Our support ranges from transactional activities to full CFO-level financial management.



Development & Growth

We provide a full suite of Development services designed around the proven “Moves Management” process and supported with advanced Salesforce CRM capabilities.



Board Management & Administration

We bring the expertise, processes and tools to assist you with planning your board meetings and ensuring you are in compliance with federal and state laws, as well as your bylaws.



IT Support & Cybersecurity

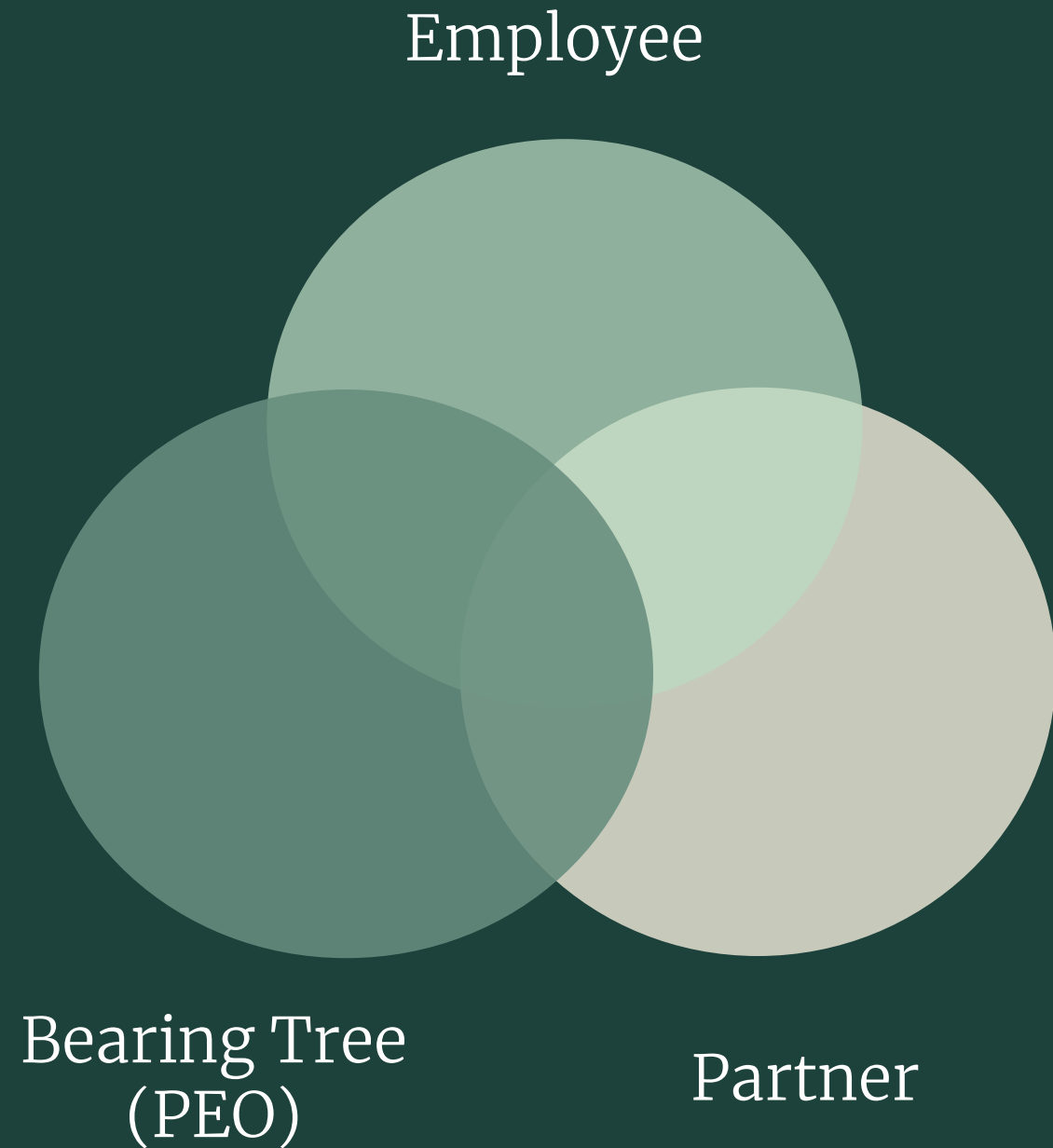
We manage IT logistics for company equipment and digital file storage security to ensure the latest security measures are in place.



Startup Solutions

We provide a full-service, turnkey start-up package for new nonprofits including initial incorporation and ongoing operational support.

WHAT IS A PEO?



Professional Employer Organization (PEO)

As a Professional Employer Organization (PEO), Bearing Tree enters into a co-employment relationship with its partners. We provide core human resource functions, such as employee benefits, payroll administration, workers' compensation, and state and federal payroll tax filings (just to name a few).

Our partners retain all other employee-related authority and responsibilities, including day-to-day direction, hire/fire decisions, performance management, compensation and promotions, etc.

From the employee's point-of-view, nothing changes aside from better and more cost-effective benefits, improved payroll administration, and more responsive employee support.

PAYROLL & BENEFITS

Bearing Tree is a Professional Employer Organization that utilizes a “co-employer” arrangement to provide you and your employees with high quality and cost-effective benefits. We handle all payroll support – from onboarding to offboarding – regardless of where employees reside. We provide the expertise and economies of scale that result in cost-effective benefits that many organizations often struggle to obtain.

CORE SERVICES

- Administer payroll, and report and remit payroll taxes regardless of where employees reside within the United States
- Provide and administer health and welfare benefits, in compliance with applicable federal and state laws: Medical, Dental, Vision, Health Flexible Spending Accounts, Health Savings Accounts, Transportation Flexible Spending, Dependent Care Flexible Spending, Disability, and Life Insurance
- Provide a 401(k) plan and manage the associated compliance requirements
- Ensure HR legal compliance
- Manage and track paid time-off, observed holidays and employee leaves of absence
- Provide Workers’ Compensation insurance coverage
- Process and defend unemployment claims
- Provide an employee handbook with latest federal and state-level required policies, including requested addendums
- Coordinate employment offers
- Coordinate on-boarding and off-boarding procedures
- Maintain compliance with all applicable employment laws including maintaining proper filing and maintenance of all personnel documentation, providing HR policies and trainings, and HR compliance guidance

FINANCE & ACCOUNTING



Bearing Tree provides a full array of financial and accounting support, ranging from “transactional” activities to full CFO-level financial management and advice. We deliver the expertise, resources and technology needed to ensure timely, accurate and auditable accounting, transactions, reporting and insights. We can provide support to your current Finance team or provide full outsourcing of your entire Finance & Accounting function.

CORE SERVICES

- Maintain bank accounts, including checking, savings, investments, and credit cards
- Complete credit card reconciliation
- Process accounts payable and receivable
- Oversee expense reimbursements
- Provide board meeting financial statements and analysis
- Provide advanced reporting and analytics leveraging the NetSuite platform and supporting tools
- Coordinate with CPA to complete annual Form 990 filing
- File Federal Form 1099 filings
- Manage annual financial audits
- Provide timely reporting dashboard, monthly close and critical insights
- Manage state annual reports and other filings with Registered Agent
- Manage and file any entity changes (name change, assumed names, address changes, director and officer changes, etc.)
- Coordinate with insurance brokers and providers to bind organizational coverage, including (if applicable): General Liability, Umbrella, D&O/Management, Commercial Property, Professional/E&O, Auto, HNOA, Key Person Life Insurance

DEVELOPMENT & GROWTH



Bearing Tree provides a full suite of Development services designed around the proven “Moves Management” process and supported with advanced Salesforce CRM capabilities. We apply innovative Development assessment tools and strategic insights to ensure the appropriate funding sources are pursued and maximized. We work closely with our Partners’ leaders to ensure they are highly engaged and increasingly expert at the key relationship building and stewardship aspects of fundraising.

CORE SERVICES

- Fundraising capability assessment and strategy development
- Foundation research, outreach, grant writing and reporting
- Prospect and donor research and outreach
- Major gift/high dollar donor strategy and support
- Mass appeal/low dollar donor strategy and execution
- Corporate donor strategy, identification and outreach
- Outsourced/”fractional” Major Gift Officer role
- Salesforce design, enhancement and management
- Coordinate and maintain state charitable registrations – initial and renewals

BOARD MANAGEMENT & ADMINISTRATION

Ensuring effective and compliant management of board of director meetings is critical to leveraging the most impact from our partner's boards. For non-profits, staying in compliance of the reporting, communications and sign-offs required of directors can be very challenging and time-consuming. Bearing Tree brings the expertise, processes and tools to ensure that the board of directors is in compliance with federal and state laws (as well as by-laws) and helping maximize its effectiveness.

CORE SERVICES

- Provide board development and training support
- Schedule and coordinate board meeting logistics
- Prepare, distribute and maintain board materials (agendas, financials, minutes, etc.)
- Apply advanced board management technology (BoardEffect) to ease and enhance the support your directors provide
- Ensure bylaws and governance compliance
- Ensure proper governance compliance including Confidentiality Agreements, Conflict of Interest Agreement, Whistleblower Policy, and Board Member Acknowledgement and Responsibilities

IT SUPPORT & CYBERSECURITY



We fully understand the critical importance of security when it comes to the work you do. Bearing Tree has partnered with CCS, Inc., a Managed Services Solutions Company. They provide and proactively manage and maintain your IT equipment and ensure the latest security measures are in place. Bearing Tree will supply laptops and other equipment (choose iOS and/or Windows) to your employees and ensure it is continuously updated with the latest security measures.

CORE SERVICES

- Asset management and inventory tracking
- Warranty monitoring and claims
- Google Workspace email management
- Microsoft Office Management
- Antivirus/Antimalware
- Computer Updates and Security Best Practices
- Budget Planning, IT Reports, and Best Practices
- Hardware Purchasing and Vendor Management
- Troubleshooting and support
- Data protection and cybersecurity

STARTUP SOLUTIONS



Bearing Tree specializes in working with early-stage/startup organizations to ensure they get off to a great start. We will provide advice and direct support to address all the critical issues – and risks – associated with organizing, registering, structuring and administering your non-profit during this critical phase. . .so you can focus on your mission

These services include:

- **Incorporation:** We set up and take care of all the federal and state filings, in partnership with legal counsel, to get your organization off the ground.
- **Fiscal Sponsorship:** We provide a sponsoring 501(c)3 organization to collect and process tax exempt donations on your behalf until your status is approved by the IRS.
- **Finance & Accounting:** We manage and maintain all bookkeeping and financial reporting activity along with corporate compliance.
- **Payroll & Benefits:** We process payroll, administer a full suite of health and welfare benefits, and manage all related tax and compliance matters.
- **Board Management:** We coordinate all board meeting logistics and board communication, while ensuring governance compliance.
- **Development Support:** We work with organization leadership to define a Case for Support and build a fundraising strategy and Moves Management philosophy with the leadership team. This is then supported by the implementation of Salesforce and training of staff.

WHAT OUR PARTNERS ARE SAYING...



“Without Bearing Tree’s support, Illinois Policy Institute simply could not have achieved what we have over the past several years. The Bearing Tree team’s thorough and proactive work allows our staff to focus on bringing positive change to the people of Illinois. We are grateful to have their support, so our staff’s every day work focuses on our mission.”

~Illinois Policy Institute



“Bearing Tree has been an essential partner to the Franklin News Foundation in the truest sense of the word. They have allowed my team and me to focus on quickly driving impact and results while knowing the essential operational details needed to grow and protect the organization are being well managed.”

~Franklin News Foundation

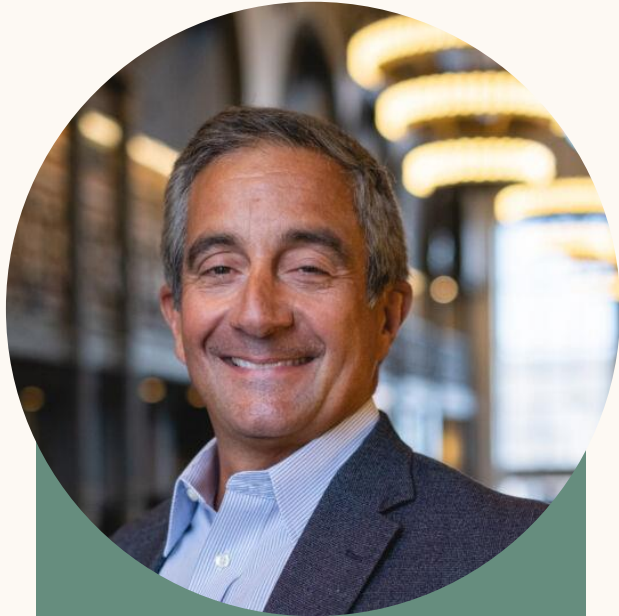


While we are implementing several aspects of a Moves Management system, your advice and counsel about leads vs. prospects, building a comprehensive system, and how we can leverage all of this in Salesforce was incredibly valuable and we're excited to start implementing many of the things we discussed yesterday.

We're so grateful for the work Bearing Tree is helping us with and look forward to continuing our partnership!

~Ballotpedia

OUR LEADERSHIP TEAM



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THANK YOU!

