

FundReady, Inc.

FundReady.app

AI-Powered Capacity-Building | Funding-Readiness Platform

OUR VISION. We envision a future where every mission-driven organization, regardless of size or background, has the expertise and resources to secure funding, innovate solutions, and drive lasting community transformation.

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FundReady, Inc. Business Plan

AI-Powered Funding Readiness Platform

Prepared for: Strategic Network Introduction

Prepared by: Stephanie Willis, Founder & Chief Executive Officer

Date: November 10, 2025

CONFIDENTIAL INFORMATION MEMORANDUM

Dear Prospective Investor,

Thank you for your interest in FundReady, Inc. This introduction comes through our trusted automotive executive network, and we're excited to share this opportunity with strategic investors who understand operational excellence and scalable business models.

This business plan contains proprietary and confidential information regarding our business strategy, financial projections, technical approach, and competitive positioning. We are sharing this information with you in confidence to facilitate your evaluation of a potential investment opportunity.

CONFIDENTIALITY AGREEMENT

By reviewing this document, you agree to the following terms:

1. Confidential Information

This business plan and all accompanying materials (collectively, "Confidential Information") are proprietary to FundReady, Inc. and contain trade secrets, business strategies, financial data, and other sensitive information not publicly available.

2. Non-Disclosure Obligation

You agree to:

- Maintain strict confidentiality of all information contained herein
- Not disclose, reproduce, or distribute this plan to any third parties without prior written consent from FundReady, Inc.
- Use this information solely for the purpose of evaluating a potential investment in FundReady, Inc.
- Limit access to the information to your investment team who have a legitimate need to know

3. Permitted Disclosures

You may disclose Confidential Information only to:

- Members of your investment committee or partners, provided they agree to maintain confidentiality
- Your legal and financial advisors, under obligation of confidentiality
- As required by law, regulation, or court order (with prior written notice to FundReady, Inc. if legally permissible)

4. Standard Exceptions

This confidentiality obligation does not apply to information that:

- Is or becomes publicly available through no breach of this agreement
- Was in your possession prior to disclosure by FundReady, Inc., as evidenced by written records
- Is independently developed by you without reference to the Confidential Information
- Is rightfully received from a third party without confidentiality restrictions

5. Return of Materials

If you decide not to pursue this investment opportunity, you agree to promptly return or destroy all copies of this business plan and certify such destruction in writing upon request.

6. No Obligation

This business plan does not constitute an offer to sell securities. Any investment in FundReady, Inc. would be subject to completion of due diligence, negotiation of definitive agreements, and compliance with applicable securities laws.

7. Intellectual Property

All intellectual property, methodologies, business processes, and proprietary concepts described herein remain the exclusive property of FundReady, Inc. Review of this plan does not grant any license or rights to such intellectual property.

8. Duration

These confidentiality obligations shall remain in effect for a period of two (2) years from the date of your receipt of this business plan, or until such time as the information becomes publicly available through no fault of yours, whichever occurs first.

INVESTMENT PROCESS

If you are interested in exploring an investment in FundReady, Inc., our proposed next steps are:

1. Initial Review (This Stage)

Review this business plan and accompanying materials to assess strategic fit and investment.

2. Follow-Up Discussion (30-60 minutes)

Schedule a conversation to address questions, discuss vision, and explore alignment.

3. Deep Dive (If mutual interest)

- Detailed financial review
- Product demonstration (available Month 3)
- Reference calls with advisors and beta users
- Technical due diligence

4. Term Sheet Negotiation (If proceeding)

- Valuation discussion
- Investment structure (SAFE, Convertible Note, or Equity)
- Board representation and governance
- Timeline to closing

5. Legal Due Diligence & Closing

- Definitive agreements drafted
- Background checks and corporate verification
- Funds transfer and equity issuance

CONTACT INFORMATION

For questions, additional materials, or to schedule a follow-up discussion:

Stephanie Willis

Founder & Chief Executive Officer

FundReady, Inc.

Email: stephanie@fundready.io

Phone: 734.620.0471

LinkedIn: [linkedin.com/in/fundready](https://www.linkedin.com/in/fundready)

ACKNOWLEDGMENT

By proceeding to review this business plan, you acknowledge that you have read, understood, and agree to be bound by the terms set forth in this Confidential Information Memorandum.

I look forward to discussing how FundReady's mission to democratize funding access for under-resourced nonprofits aligns with your investment thesis and values.

Sincerely,



Stephanie Willis

Founder & Chief Executive Officer

FundReady, Inc.

Available Materials:

- Executive Summary (9 pages - enclosed)
- Platform MVP Mockup (enclosed)

Available Upon Request:

- Full Business Plan (64 pages)
- Financial Projections & Strategy (31 pages)

DISCLAIMER: This business plan and accompanying financial projections contain forward-looking statements regarding future performance, growth projections, and market opportunities. Actual results may differ materially from those expressed or implied. Past performance is not indicative of future results. These financial projections are based on current assumptions and involve risks and uncertainties that could cause actual outcomes to differ materially. The information herein is provided for informational purposes only and does not constitute legal, financial, or investment advice. An investment in FundReady, Inc. involves substantial risk and is suitable only for investors who can afford to lose their entire investment.

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FundReady, Inc. Business Plan

AI-Powered Capacity-Building | Funding Readiness Platform

Location: Oakland County, MI
Legal Structure: C-Corporation (*forming*)
Stage: Pre-Seed / Early Stage
Ask: \$2.6M
Prepared for: Strategic Network Introduction
Date: November 5, 2025

EXECUTIVE SUMMARY

Introduction and Business Overview

FundReady, Inc. is an AI-powered capacity-building platform revolutionizing how under-resourced nonprofits access institutional funding. Based in Oakland County, MI, we are a pre-seed stage social enterprise founded by Stephanie Willis, combining deep nonprofit sector expertise with cutting-edge artificial intelligence to solve a \$7.5 billion market inefficiency.

What We Do:

We deliver professional-level grant writing and strategic planning expertise to small nonprofits and social enterprises at 90% lower cost than traditional consulting—using AI not as a replacement for human thinking, but as an educational coach that builds sustainable organizational capacity. Our platform teaches users to think strategically, design fundable programs, and write compelling proposals. We help them develop the internal capacity to build stronger programs and expand their impact.

Problem And Solution

Mission and Objectives

Mission:

Democratize access to institutional funding by empowering under-resourced nonprofits and social enterprises with the strategic capacity needed to secure funding, scale programs, and create sustainable community impact.

Core Objectives:

- Build permanent organizational capacity in strategic planning, grant writing, and systems development
- Reduce cost barriers to professional-grade capacity building (96% cost reduction vs. traditional consultants)
- Scale access to 400,000+ U.S. nonprofits currently priced out of capacity-building services
- Unlock community funding by equipping organizations to compete for institutional grants
- Create sustainable impact through skills transfer, not consultant dependency

The Social Problem We Address

The Capacity Crisis:

Scale of the Problem:

- **1.28 million organizations** (780K nonprofits + 500K social enterprises) lack capacity to compete for institutional funding
- **\$7 billion+ in grants** go unclaimed annually due to organizations lacking application capacity
- **780,000 nonprofits** with budgets under \$1M cannot afford traditional capacity-building services
- **70% of Executive Directors** spend 70% of their time on administrative work instead of mission delivery
- **40% of nonprofits** operate with no full-time development staff
- **53% of nonprofits** have less than 3 months of operating reserves

The Root Cause:

- Traditional grant consultants charge **\$15,000-\$60,000** for comprehensive capacity building
- Per-proposal costs: **\$2,500-\$7,500** for foundation grants, **\$6,000-\$20,000** for federal grants
- Small nonprofits need **5-8 grant applications annually** to sustain operations
- Total annual consulting costs: **\$25,000-\$75,000** (10-30% of total operating budget)
- This is an impossible choice: ***hire a grant writer OR hire staff to serve the community***

Primary Population Served:

- **780,000 nonprofits with budgets under \$1M** - cannot afford consultants (transformational need)
- **500,000 social enterprises** - seeking SBIR/STTR grants, impact capital
- BIPOC-led organizations (disproportionately under-resourced)
- Rural nonprofits (lacking access to local consulting expertise)
- Grassroots organizations with <\$500K budgets doing transformative work

Our Solution

FundReady provides AI-powered, affordable capacity-building infrastructure that teaches nonprofits to build professional-grade strategic planning, grant writing, and impact measurement systems—without requiring expensive consultants.

Core Deliverables:

- **Strategic Plan** (mission, vision, 3-5 year goals, theory of change)
- **Program Portfolio** (up to 10 programs fully documented with logic models)
- **Operating Budget** (3-year financial projections aligned to programs)
- **Fundability Dashboard** (real-time capacity readiness score)
- **Impact Measurement Framework** (outcomes tracking, KPIs, data collection systems)
- **Standard Grant Packages** (LOIs, full proposals, budgets - ready to submit)
- **Case for Support** (organizational overview for all funders)
- **Grant Discovery & Matching** (integrated with Candid/GrantStation APIs)
- **Team Collaboration Tools** (multi-user platform, version control)
- **Community Access** (peer learning forum, office hours, success stories)

The FundReady Difference:

- **Affordability:** \$79-\$399/month for full platform access (vs. \$15,000-\$60,000 for consultants) - **96% cost reduction**
- **Scalable:** Can serve 780,000 nonprofits and 500,000 social enterprises consultants can't reach
- **Permanent Capacity Building:** Organizations learn strategic frameworks (not just receive documents) and build independence from external consultants
- **Comprehensive Infrastructure:** Not just grant writing—full strategic capacity (planning + systems + measurement) with ongoing value

Impact

How FundReady Improves Existing Efforts

VS. TRADITIONAL CONSULTANTS:

- **Cost:** 96% more affordable (\$2,400/year vs. \$60,000)
- **Capacity building:** Teaches skills vs. creates dependency
- **Scalability:** Can serve 400,000 orgs consultants can't reach
- **Accessibility:** Available to rural, BIPOC-led, grassroots organizations

VS. GENERIC AI TOOLS:

- **Nonprofit-specific guidance:** Trained on grant writing best practices, funder requirements
- **Strategic frameworks:** Builds comprehensive capacity infrastructure, not just text generation
- **Coherence:** Ensures all documents align and connect (logic models ↔ budgets ↔ outcomes)
- **Support:** Community, office hours, peer learning (not just software)

THE CATEGORY WE'RE CREATING:

FundReady is the ONLY solution combining: AI-powered guidance + comprehensive capacity building + affordable pricing + ongoing platform value + strategic infrastructure

Benefits to Underserved Populations

- **PRIMARY POPULATION:** 780,000 nonprofits with budgets under \$1M
- **SECONDARY POPULATION:** 500,000 social enterprises seeking grants and impact capital
- **TOTAL ADDRESSABLE:** 1.28M organizations needing affordable capacity building

Specific Underserved Groups:

1. BIPOC-Led Organizations:

- Disproportionately under-resourced due to systemic funding inequities
- Less access to professional networks and consulting relationships
- **FundReady's impact:** Provides equal access to professional-grade strategic infrastructure
- **Outcome:** Levels playing field for organizations led by founders from communities they serve

2. Rural Nonprofits:

- Geographic isolation from consulting expertise (concentrated in urban centers)
- **FundReady's impact:** Digital-first platform accessible anywhere with internet
- **Outcome:** Rural communities gain capacity-building access previously unavailable

3. First-Time Executive Directors:

- Promoted from within community-serving roles (not corporate fundraising backgrounds)
- **FundReady's impact:** Teaches Fortune 500 strategic frameworks in accessible language
- **Outcome:** Community leaders gain skills to sustain organizations long-term

4. Grassroots Organizations (<\$500K budgets):

- Doing transformative community work but lack infrastructure
- **FundReady's impact:** \$79/month entry point makes participation possible
- **Outcome:** Smallest organizations gain capacity to scale impact

PROJECTED IMPACT AT SCALE:

- **Year 3: 8,000 organizations** equipped (1% of 780K primary market)
- **Market headroom: 99% untapped** - massive scalability potential
- **\$50M+ in community funding** unlocked through capacity building
- **3x capacity increase** for participating nonprofits

Our Unique Approach

What Makes Us Unique:

1. Founder's Rare Background:

- 25+ years Fortune 500 experience (DTE Energy, Google Fiber, GM, Ford, Harley Davidson)
- *Not an ex-nonprofit professional teaching nonprofit tactics* → **nonprofits translator**
- **SDG Alignment:** Primary SDG 10 (Reduced Inequalities)

2. Category-Defining Innovation:

- **Zero direct competition** in our exact quadrant (affordable + comprehensive + AI-powered) [see pitch deck slide → SLIDE-9 "Competitive Landscape"](#)
- Creating new market: "AI-powered nonprofit capacity infrastructure"

3. UN Sustainable Development Goal Alignment:

- **Primary: SDG 10 (Reduced Inequalities)** - Democratizing access to capacity-building infrastructure
- **Supporting:** SDG 1 (No Poverty), SDG 8 (Decent Work), SDG 17 (Partnerships)

Scale

Market Size & Growth Plan

Total Addressable Market:

- **TAM: \$1.5B annually** (1.28M organizations)
- **Primary SAM: \$936M** (780K nonprofits <\$1M budgets)
- **Secondary SAM: \$600M** (500K social enterprises)
- **Beachhead: \$50M** (42K Michigan organizations)

3-Year Scaling Targets:

- **Year 1:** 400 customers, \$630K ARR
- **Year 2:** 3,500 customers, \$6.9M ARR, EBITDA positive (46% margin)
- **Year 3:** 8,000 customers (1% of 780K primary SAM), \$16M ARR, 64% EBITDA margin

Why This is Scalable:

- **Massive untapped market:** 99% of 780K nonprofits still unreached after Year 3
- **Software margins:** 88%+ gross margins as platform scales
- **Multiple revenue streams:** SaaS (70%) + Workshops (20%) + Partnerships (10%)

Earned Income Model

Three Sustainable Revenue Streams:

- **SaaS Subscriptions (70%):** \$79-\$399/month, recurring revenue, high margins
- **Workshops (20%):** \$295-\$1,997 per cohort, validated with \$15K-\$30K early revenue
- **Enterprise Partnerships (10%):** Associations, foundations, corporate CSR programs

Path to Sustainability:

- **Year 2: EBITDA positive** - sustainable without additional capital
- **Year 3: Highly profitable** - can fund growth from operations

Earned Income Sources for Sustainability

FundReady operates as a for-profit social enterprise with three sustainable, scalable revenue streams:

► REVENUE STREAM 1: SaaS Subscriptions (70% of revenue by Year 3)

- **Starter Plan: \$79/month** (\$948/year) - Solo practitioners, new nonprofits
- **Professional Plan: \$199/month** (\$2,388/year) - Established nonprofits, multi-program orgs
- **Enterprise Plan: \$399/month** (\$4,788/year) - Multi-site organizations, capacity intermediaries
- **Why it works:** Recurring revenue, low churn, 88%+ gross margins as software scales

► REVENUE STREAM 2: Workshops & Training (20% of revenue by Year 3)

- **28-Day Grant Readiness Sprint: \$797** - Fast-track introduction, monthly cohorts
- **Core 4 Deep Dive: \$1100+** - Intensive strategic planning around core infrastructure
- **12-Week Accelerator: \$4000-\$12,000** - Comprehensive capacity building transformation
- **Current status:** \$15K-\$30K in workshop revenue already generated (Year 0)

► REVENUE STREAM 3: Enterprise Partnerships (10% of revenue by Year 3+)

- **National Associations:** Site licenses for member organizations (NTEN, GPA, AFP)
- **Foundation Grantmaking Support:** Provide platform to grantees as capacity-building component
- **Corporate CSR Programs:** Platform access for nonprofit partners

Path to Financial Independence:

- **Year 1:** Seed capital funds runway, early revenue validates model
- **Year 2:** EBITDA positive (\$3.2M, 46% margin) - sustainable without additional capital
- **Year 3:** Highly profitable (\$10.2M EBITDA, 64% margin) - can fund growth from operations

Leadership

Meet Stephanie Willis, Founder & CEO

Stephanie Willis brings a rare combination of Fortune 500 corporate expertise and nonprofit capacity-building experience, positioning her uniquely to bridge the language gap between funders and nonprofits.

FORTUNE 500 CORPORATE EXPERIENCE (25+ years):

- DTE Energy, Google Fiber, Harley Davidson, General Motors, Ford Motor Company
- Roles: Business/Data Analyst, Business Operations, Systems Analyst
- **Expertise:** SCRUM-certified Project Manager, SQL/data analytics, KPI development, Enterprise financial auditing
- Lean Six Sigma methodologies, process optimization, systems building
- Built automated solutions reducing processing time by 95%

NONPROFIT CAPACITY-BUILDING EXPERIENCE (3+ years):

- Grant Strategist & Business Consultant for underserved organizations
- Developed 12-Week Grant Readiness Sprint curriculum
- Deep understanding of funder requirements and evaluation frameworks

THE PIVOTAL INSIGHT:

During COVID, Stephanie submitted a grant proposal for her “social enterprise centered” business and was rejected twice by the same funder—despite having a strong case statement. After years in Fortune 500 strategic planning, she recognized the disconnect: ***Funders speak corporate language, social enterprises write from the heart.***

She rewrote the same proposal using Fortune 500 strategic frameworks. Third submission to the same funder: **Funded \$180,000.**

The mission never changed. The language did.

Why Stephanie is Uniquely Positioned:

- Rare expertise combination: Corporate strategist + nonprofit practitioner
- Lived experience: Understands both funder and nonprofit perspectives
- Proven track record: \$50M+ raised demonstrates methodology effectiveness
- Technical fluency: Can build and scale software products
- Market validation: Early workshop revenue proves market demand and execution ability
- Mission authenticity: Personal commitment to equity and capacity building

Full Resume/CV attached (Appendix B)

Next Steps & Additional Materials

Supporting Materials Available:

- **19-Slide Pitch Deck** (attached) - Comprehensive overview of problem, solution, market, business model, traction
- **Financial Projections Model** (available upon request) - 3-year detailed financial model, unit economics, sensitivity analysis
- **Full Business Plan** (available upon request) - 64-page comprehensive plan covering all business aspects
- **Product Demo** (available upon request) - Platform mockup

Materials Available:

- Full Business Plan
- Financial Projections (3 year)
- Technical Specifications (Initial)
- User Flow Diagrams (Initial)
- Competitive Analysis (included in the full plan)
- Founder Resume/CV (Appendix)
- Mock up (Appendix)

Contact Information:

Stephanie Willis

Founder & CEO, FundReady, Inc.

Email: Stephanie@fundready.io

Phone: 734.620.0471

LinkedIn: [linkedin.com/in/fundready](https://www.linkedin.com/in/fundready)

Website: FundReady.io (parked) | FundReady.app (beta waitlist)

THE VISION: FUNDING THE FUTURE

"Nonprofits drive change. Funders enable it. The missing piece? The infrastructure that connects mission to money. We're building that bridge for 400,000 organizations who've been left behind. This isn't just software. This is how we fund the future."



— Stephanie Willis, Founder & CEO

Thank you for considering FundReady, Inc. for funding.

We look forward to discussing how FundReady can transform nonprofit capacity building and unlock millions in community funding.

APPENDICES

Appendix A: Mock Up

FundReady Welcome Back, Stephanie! AI Coach Export Package

Your Fundability Score

65% Ready

Foundation Grants Ready Need Gov Grant Docs

Improve Score View Details Training

Build Your Package

- Mission & Vision Complete
- Theory of Change In Progress (92%)
- Program Framework In Progress (60%)
- Budget Narrative Not Started

Coherence Engine™ Insights

Budget Update Detected
You updated your Youth Program budget from \$50,000 to \$75,000. Should we update the staffing plan and outcome targets to reflect this increased capacity?
Yes, Update All Not Now

Coherence Check Complete
All documents are aligned! Your Theory of Change, Program Descriptions, and Budget are 92% coherent. Great work!

Enhancement Suggestion
Based on similar organizations, consider adding a Community Engagement metric to your Theory of Change. This could strengthen foundation grant applications.
Add Metric Learn More

FundReady Welcome Back, Stephanie! AI Coach Export Package

AI Coaching Session

Let's work on your Theory of Change. You mentioned wanting to reduce youth homelessness by 40% in 3 years. That's ambitious! What specific activities will you implement to achieve this outcome?
2 minutes ago

SW We'll provide emergency shelter, job training, and case management services.
1 minute ago

Excellent start! Now let's dig deeper: For your job training program, what specific skills will you teach? And how will you measure whether participants actually secure employment? Funders love to see clear, measurable outcomes.
Just now

AI is thinking...

Type your response... Send →

Document Vault

- IRS 501(c)(3) Letter
Uploaded • 2.3 MB
- Board Member List
Complete • Updated 3 days ago
- 990 Tax Return
Missing for Gov grants
- Audited Financials
Draft • Needs review

Upload Document

Recent Activity

- Theory of Change updated—coherence check: 92%
15 minutes ago
- New document uploaded: Board of Directors list
3 hours ago
- Program budget revised: Youth Services (+\$25K)
Yesterday
- Fundability score increased from 58% to 65%
2 days ago

Appendix B: Founder Biographies

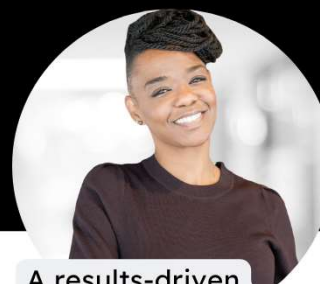
Stephanie Willis - CEO & Founder

High-impact proposals

STEPHANIE WILLIS

The Grant Strategist

removing barriers to FUNDING THE MISSION



A results-driven strategist with 20+ years of data-driven expertise

Email: Stephanie@fundready.io | [Social Links](#)

Phone: 734.620.0471

TECHNICAL CAPABILITIES

- Grant Writing Tools: Logic Model Development, Theory of Change Modeling, Impact Measurement, Needs Assessment, Budget Development
- Data Analysis: MS Excel (Advanced), SQL, Power BI, Statistical Analysis, KPI Development, Performance Metrics

WORK EXPERIENCE

Grant Strategist & Facilitator

FundReady, Inc. | Onsite & Remote

Manufacturing-Retail Business Owner

Bodytruth Soap Apothecary | Lawrence KS + Online

Project Management Analyst

Google Fiber | Kansas City MO

Senior Data Analyst

Harley Davidson | Kansas City MO

Senior Data Analyst & Contract Admin

DTE Energy | Detroit MI

EDUCATIONAL HISTORY

Project Management (CAPM)

CE Certificate, July 2019

Johnson Community College

Agile Scrum Master

CE Certificate, July 2019

Simplilearn (Scrum Alliance)

Lean Six Sigma Yellow Belt

Corporate Training, 2011

Business Administration | HR Management

Associates of Arts, 2005

Baker College of Michigan

GRANT WRITING & STRATEGY

- Program Design & Logic Models
- Grant Research & Proposal Writing
- Funder Relationship Building
- Impact Measurement & Reporting
- Budget Development & Management
- Strategic Planning & Evaluation
- Theory of Change Development
- Needs Assessment & Gap Analysis
- Grant Readiness Training
- Storytelling & Case Development

SYSTEMS & PERFORMANCE

- Problem Solving
- Root Cause Analysis
- Performance Improvement
- Process Mapping/Modeling
- Project Management
- Technical Writing (SOPs, SWIs)
- Instructional Design

DATA HANDLING & FINANCE

- Data Modeling & Design
- Key Metrics & Report Design
- Spend Visibility & Analysis
- Budgeting & Forecasting
- Data Cleansing & Analysis
- Performance Reporting

