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Fractional, Consultant, Freelancer, Part-Time, Temp: *How to Get What You Really Need*

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KMD



DKM

Part One: **WHAT** Do You Need?

- Know roles and responsibilities of each team member
- Audit what you are currently doing
- SWOT it out—identify gaps in needs/strengths and personnel
- Account for additional projects or responsibilities coming down the pike (or that might be)

S**Strengths****W****Weaknesses****O****Opportunities****T****Threats**



Part Two: **WHO** can help?

*Help doesn't
always have to be
more full-time
employees.*

HELP WANTED!



Part Two: Tax Status

Form W-2

Form **W-2** Wage and Tax Statement **2025**
 Copy C - For EMPLOYER'S RECORDS (See Notice to Employer on the back of Copy B) or Copy 2 to be Filed With Employer's State, City or Local Income Tax Return

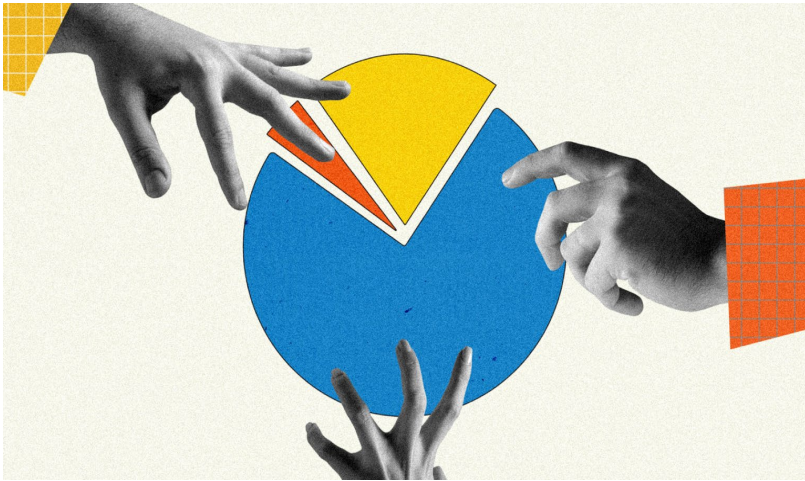
annual wage and tax statement
from an employer

Form 1099 (NEC)

Form **1099-R** (see instructions) **2025**
 Copy C - For Recipient's Records

annual statement for non-employees
paid by an organization

Part Two: Fractional Employee



works for you on a part-time, limited or shared basis, usually at the C-suite or executive level

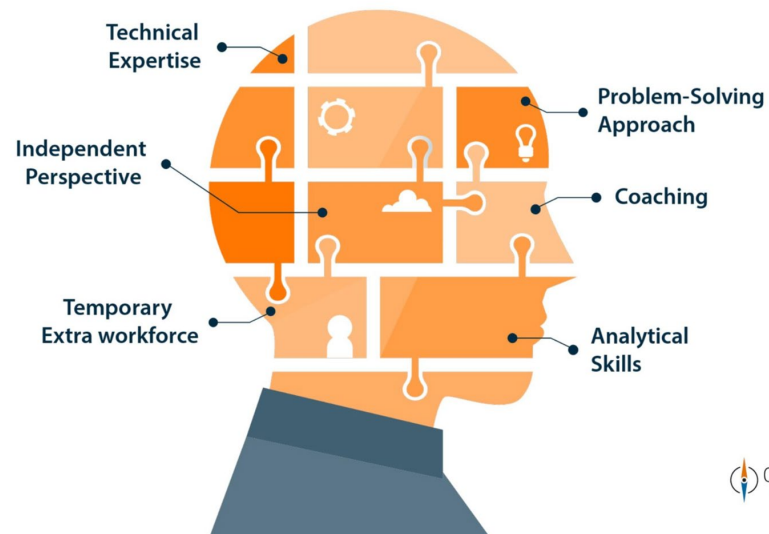
Senior-level expertise and experience without hiring a permanent or full-time employee

Usually not employed directly by your organization (1099), so no benefits or leave

Amount and length of time set by mutual agreement

Generally set their own schedule, within confines of client needs

Part Two: Consultant



offers expert advice and recommendations for specific projects, processes, activities, goals or challenges

Expertise without investing in a full-time or permanent hire

W-2 employee with a firm or 1099 independent contractor, no benefits or leave

Outside perspective based on industry knowledge and experience

Schedule is mutually negotiated

Part Two: Freelancer



self-employed, works independently and often remotely, usually on a specific project or projects

Hired to do work without investing in a full-time or permanent hire

An independent contractor (1099) with no benefits or leave

Can provide one-off or repeated support for specific work

May or may not develop a long-term relationship with your organization

Part Two: Part-Time Employee



works fewer hours than a regular full-time employee

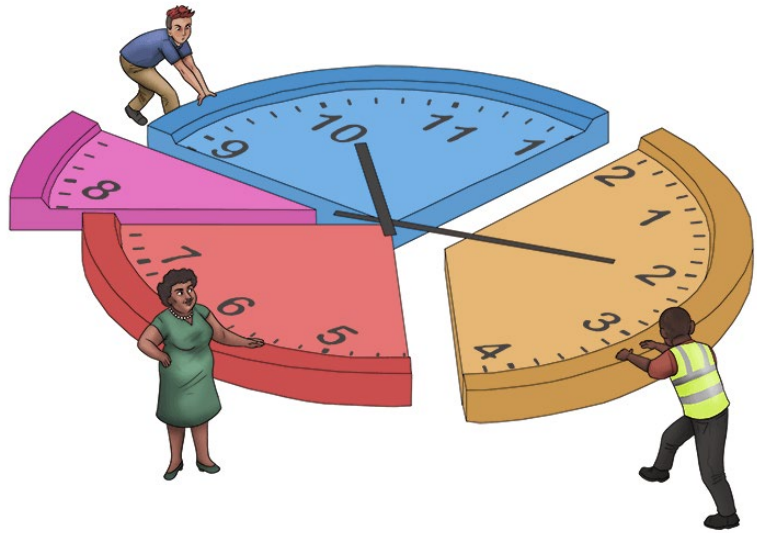
Hired to do work without investing in a full-time or permanent hire

Employee (W-2) who may receive some benefits or leave

Has a defined position description, is responsible for ongoing work

Usually has a set schedule

Part Two: Temporary Employee



works fewer hours than a regular full-time employee

Hired to do work without investing in a full-time or permanent hire

Usually not employed directly by your organization (1099), so no benefits or leave

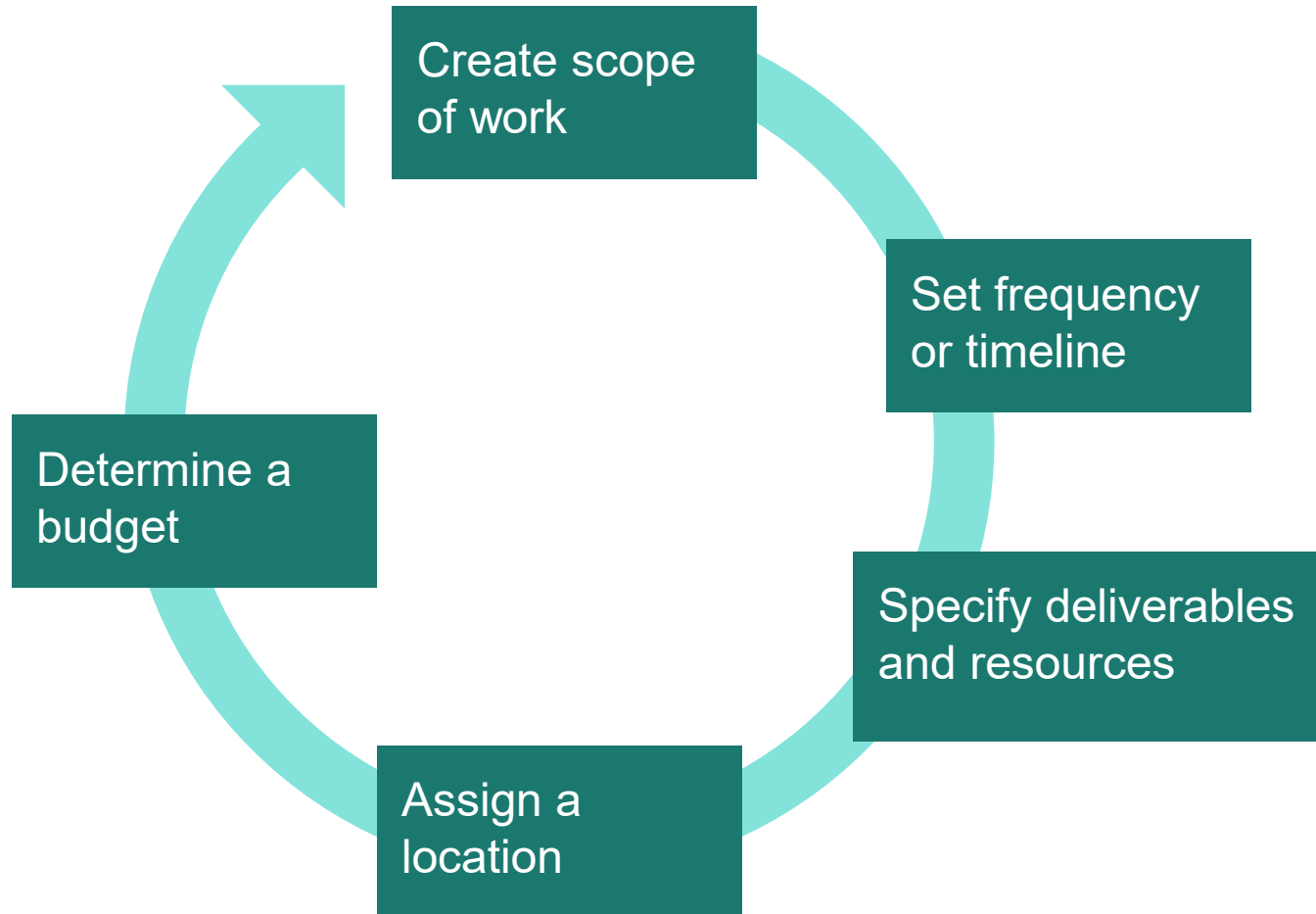
Has a defined position description and responsibility for specific work

Usually has a set schedule

WHO
YOU
GONNA
CALL?



Part Three: **HOW** will it work?



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Budget factors to consider

- Do you have any budget restrictions (state vs. foundation)?
- Will you have to pay for items beyond compensation (benefits, travel, hotel, food)?
- Will you pay by the hour, by the project or on a retainer?

Part Three: **HOW** will it work?

Setting Up for Success

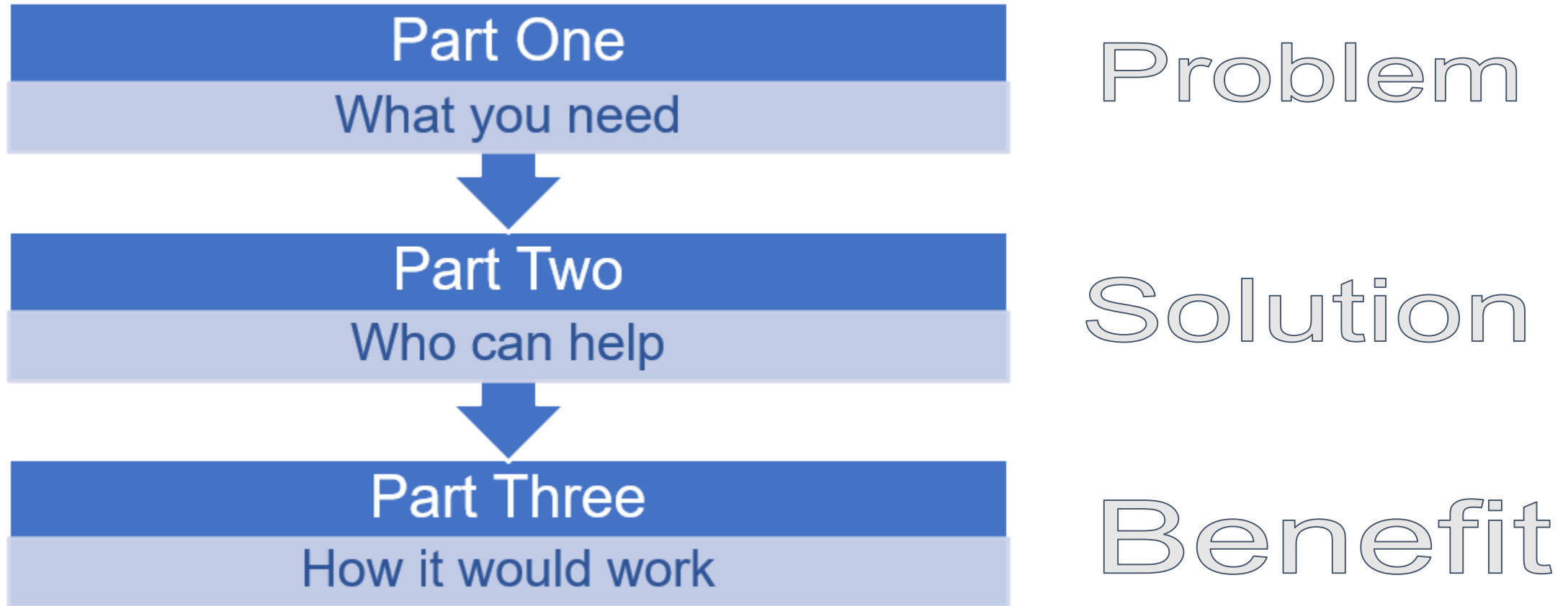
- Who will manage the work?
- Can you extend the contract if you want to or need to?
- Will you provide a laptop, an email address, access to your CRM or other technology?

Part Three: **HOW** will it work?

How does your organization contract with external sources?

- How can you retain services you need: RFP, open hire, state procurement?
- Will you require a confidentiality agreement and a non-disclosure agreement?
- Will you use your standard contract or theirs?
- Who retains ownership of creative or intellectual property?
- Will a 1099 or a W-2 be required?

Part Four: **WHY** it will work, your **PITCH**



Part Five: Finding WHO and WHAT You Need

- Use your network, industry organizations and local chapters
- Ask for referrals
- Seek out an organization or profession preferred vendor list
- 990 forms for other organizations

Part Six: Getting it done

- Be clear: clarity is kindness.
- Communicate clear scope of work, expectations and deadlines for deliverables.
- Check in and update regularly.
- Deliver payments, reimbursements and tax forms expediently and as specified by contract.
- Conclude your engagement professionally and appropriately.



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Questions?



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