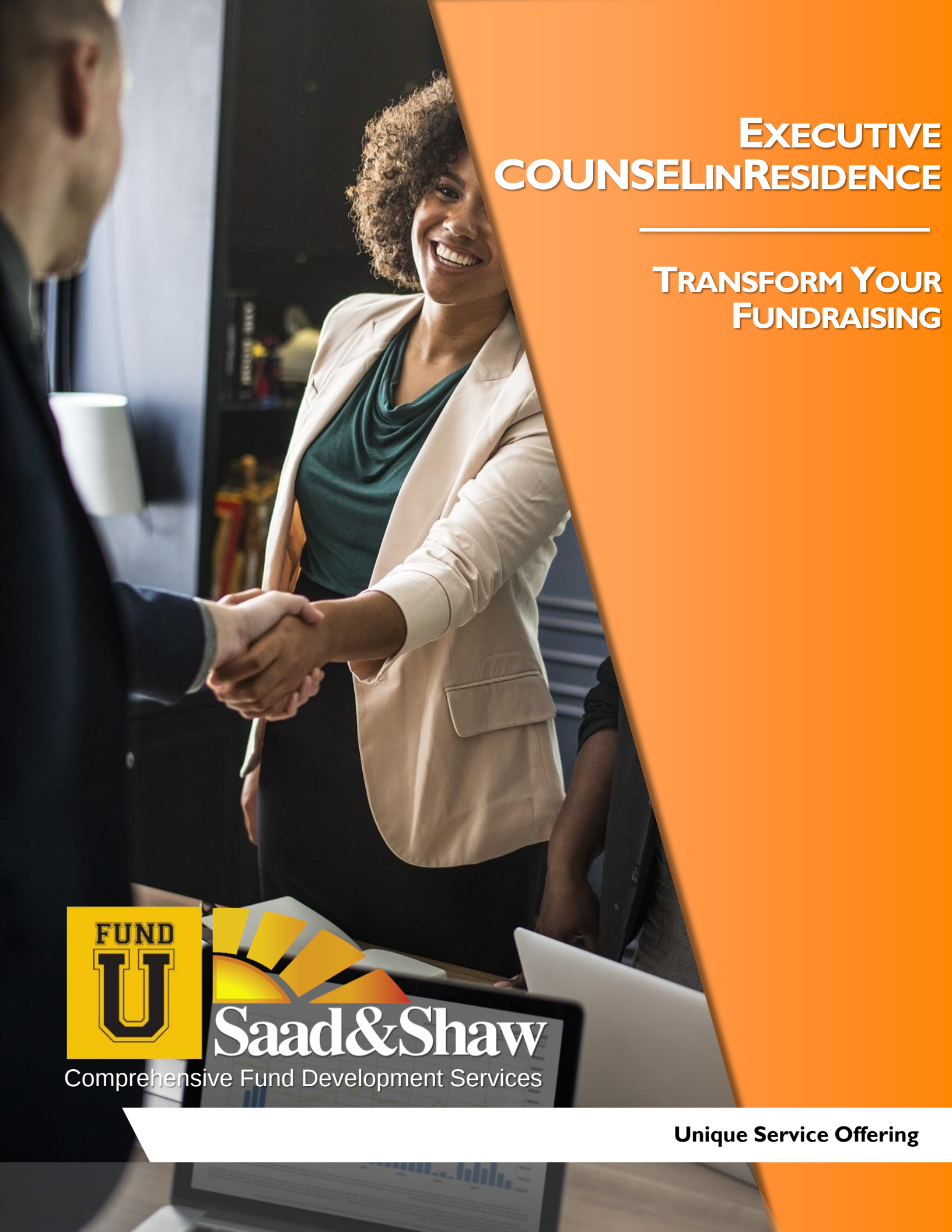




EXECUTIVE COUNSEL IN RESIDENCE

TRANSFORM YOUR
FUNDRAISING



Saad & Shaw

Comprehensive Fund Development Services

Unique Service Offering

EXECUTIVE COUNSELINRESIDENCE

In today's uncertain landscape, institutional resilience demands immediate, strategic action, **especially in the area of fundraising.**

Saad&Shaw's Executive COUNSELinResidence delivers decades of fundraising expertise directly to your team, condensing months of planning into a powerful 12-week engagement that produces immediate results while building sustainable growth.

Saad&Shaw's team of fundraising professionals has built a reputation of zooming in on the strengths of the people we work with to boost fundraising results.

And while times may be changing, our services are not—we continue to offer the latest in fundraising thought leadership.

If your advancement department needs customized guidance, we're equipped to offer it, so your institution not only stays strong, but has the capacity to grow during the best of times—and during times of uncertainty.



Why Saad&Shaw...and why now?

Why Us

Through **Executive COUNSELinResidence**, Saad&Shaw provides robust and intensive services that condense months of fundraising planning into a **12-week program** with minimal disruption to your staff's daily work and schedule ...and **without sacrificing need-to-know industry knowledge.**

During that time, we work closely with your leadership and advancement team to craft strategies that will meet your **immediate and long-term fundraising needs.**

Our guidance style is **individualized and step-by-step.** We collaborate with each member of your team, one-on-one, to identify their strengths so they can take actionable steps to make those strengths shine—and so your team can effectively and quickly **jumpstart your fundraising efforts.**

The result? Sustained relationships with your donors, increased energy and focus among your team members, and customized models tailored to boost your fundraising goals.

Why Now

When it comes to funding, the short-term path forward is a bit murky—and *that's exactly what makes investing now so important.*

By engaging with your stakeholders more strategically as partners you'll do more than strengthen your institution in the near term — you'll gain important **buy-in and advocacy** while strengthening your institution's **core fundraising infrastructure and capacity.**



About the Program

During our 12-week **Executive COUNSELinResidence** program, Saad&Shaw will **work side-by-side** with your team, including your president, cabinet, development staff, trustees, and fundraising volunteers, to create and implement strategies for more effective donor engagement.

Our initial interview is intensive and conducted onsite. From there, we'll partner with your team remotely via phone, email, and video to review your fundraising results, refine your strategies, and discuss new opportunities and challenges.

In addition to reviewing donor and prospect records, we'll also evaluate efficacy and revenue projections for special events. And we'll support you in being accountable and transparent about **what is and isn't working when it comes to your fundraising efforts.**

All members of your advancement team—including the president—will be offered weekly assignments, evaluation measures, and timetables designed to stimulate your institution's fundraising. Our **three-step program** is guided by senior-level executives with decades of experience in diverse environments.

In addition to being **affordable**, **Executive COUNSELinResidence** is **flexible**. Our return visits can be scheduled on a monthly basis and reduced to quarterly visits as your team becomes more experienced at managing the fundraising process.

We will always be available to you by phone and email in between visits.

Ready to learn more?

901-522-8727

melandpearl@saadandshaw.com



Our Three Step Program

Step One: Quick Assessment

We'll assess your current fund development and fundraising program. In addition to having conversations with your staff, board members, and fundraising volunteers, we'll review your current fundraising goals, plan, activities, and strategies; recent giving data; and your top prospective donors. If you're not sure how to prioritize your prospects and donors, don't worry—we'll guide you.

Step Two: Initial Action Steps

We'll help you take action. Using the knowledge we gained in Step One, we'll help you craft strategies that engage your key audiences, whether through a special campaign to encourage alumni giving, a series of individual meetings with stakeholders, or a targeted major gifts campaign led by those closest to the institution.

Step Three: Real-Time Optimization

We'll evaluate the results of your actions with you so you can make changes in real-time. A targeted program can be expanded and new strategies developed based on changes in the environment or feedback from donors and stakeholders. What's most important is executing activities that produce results—and that's where we come in. We'll be by your side to evaluate your fundraising results so your team can pivot as needed at a moment's notice.

Executive COUNSELinResidence

Strengthen Your Fundraising Today,
Ensure Its Impact for Tomorrow.



Executive COUNSELinResidence will enable you and your team to...

- **Define** targeted fundraising goals and outcomes
- Secure the expertise you need at an **affordable rate**
- Implement an effective fundraising plan through our **tested methodology**
- Quickly retool your fundraising program to **offset any loss** of time and momentum
- **Sustain engagement** with donors and stakeholders by sharing your institution's compelling story
- **Develop and strengthen** your staff, board, and volunteers
- Work with a **prioritized list** of prospects, including profiles, areas of philanthropic interest, and ask amounts
- Track progress using a **fundraising timeline** and activity chart with milestones

Ideal for institutions with...

- New or interim presidents
- Board mandates to increase fundraising
- An advancement department that is in transition
- A need to enhance your team with experienced professionals
- Limited advancement staff, early-career professionals, and even those with "no staff"

You determine what you want to achieve.
We'll help you get there.

Additional Benefits

The benefits of Executive COUNSELinResidence are many. Our personalized approach blends planning and data with training and coaching, providing team members with the opportunity to strengthen their skills and learn new ones. We share ideas for engaging the larger campus community to help you launch your fundraising.

Training and Coaching

- Training sessions for staff and volunteers to **strengthen their fundraising** skills and abilities
- One-on-one **coaching sessions** for leadership staff, including the president, vice president of advancement, and board chair
- **Team meetings** with advancement staff and members of the board development team
- **Action plans** for select team members
- **Organizational strategies for fundraising continuity during a time of leadership transition**

Connections and Launch Support

- Guidance for **creating a culture of fundraising** across the campus and amongst alumni and trustees
- **Personalized support** for trustees, directors, campaign leadership, and alumni leadership
- Activities designed to **generate revenue** and engage leadership
- Guidance in asking for **in-kind resources**

Want to learn more?
901-522-8727
melandpearl@saadandshaw.com



When you sign up for the program, you'll receive...

- Timeline and activity chart
- A fundraising playbook with strategies that your institution's unique needs
- Our books, *Strong Leaders, Better Results: Learn to Optimize your Nonprofit Board* and *Prerequisites for Fundraising Success: 18 Things Every Fundraising Professional, Board Member, or Volunteer Needs to Know*
- Evaluation and assessment forms
- Updates from our weekly blog, FUNdraising Good Times
- A subscription to our monthly newsletter

Additional Services

In addition to our 12-week **Executive COUNSELinResidence** fundraising program, Saad&Shaw offers state-of-the-art services that will boost your institution's fundraising goals, including...

- **Case for support development and redesign** with copywriting, data, and graphics to communicate to funders why their support matters
- Guidance in the **creation of proposals** for submission to philanthropic and corporate foundations
- Letter drafting to **introduce your institution** to prospective donors, funders, and/or volunteers
- Letter drafting to **follow up on meetings** held by the president, trustees, or volunteers
- Grow Your Own Program: **specialized support** for new employees

Ready to take the next step?

901-522-8727

melandpearl@saadandshaw.com

Ready to Strengthen Your Fundraising?

Contact us today to discuss how
Executive COUNSELinResidence
can transform your fundraising outcomes.

melandpearl@saadandshaw.com

(901) 522-8727 (ofc)

(510) 798-4888 (cell)

For a list of clients served, including a list of institutions of higher education, visit our website: www.saadandshaw.com.

