



COUNSEL IN RESIDENCE

TRANSFORM YOUR FUNDRAISING



Saad & Shaw

Comprehensive Fund Development Services

Unique Service Offering for Nonprofit Organizations

COUNSELINRESIDENCE

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

Saad&Shaw's 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 development department needs customized guidance, we're equipped to offer it, so your nonprofit 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 **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 development 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 nonprofit in the near term — you'll gain important **buy-in and advocacy** while strengthening your organization's **core fundraising infrastructure and capacity.**



About the Program

During our 12-week **COUNSELinResidence** program, Saad&Shaw will **work side-by-side** with your team, including your executive director, chief financial officer, development director and staff, board members, 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 development team—including the executive director—will be offered weekly assignments, evaluation measures, and timetables designed to stimulate your nonprofit's fundraising. Our **three-step program** is guided by senior-level executives with decades of experience in diverse environments.

In addition to being **affordable**, **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 giving from the community, a series of individual meetings with stakeholders, or a targeted major gifts campaign led by those closest to the organization.

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.

COUNSELinResidence

Strengthen Your Fundraising Today,
Ensure Your Impact for Tomorrow.



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 organization'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 nonprofit organizations with...

- New or interim executive directors
- Board mandates to increase fundraising
- A development/fundraising team that is in transition
- A need to enhance your team with experienced professionals
- Limited development 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 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 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 executive director, director or vice president of development, and board chair
- **Team meetings** with development and fundraising 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 organization and amongst those served or advocated for, and board members
- **Personalized support** for board members, and campaign leadership,
- Activities designed to **generate revenue** and engage leadership
- Guidance in asking for **in-kind resources**

Want to learn more?
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Ready to Strengthen Your Fundraising?

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

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For a list of clients served, visit our website:

www.saadandshaw.com.

