



# Saad & Shaw

Comprehensive Fund Development Services

# Positioning Organizations for Success

Nonprofits ♦ Colleges & Universities ♦ Businesses ♦ Faith Organizations ♦ Philanthropy

Image: Construction of Bayview Senior Center, San Francisco, CA

UNAUTHORIZED VEHICLES PARKED  
IN DESIGNATED ACCESSIBLE  
SPACES NOT DISPLAYING  
DISTINGUISHING PLACARDS OR  
OTHER IDENTIFICATION  
WILL BE TOWED AWAY  
TOWED VEHICLES  
MAY BE RECLAIMED AT  
COURTESY TOW 415-431-8400  
OR BY TELEPHONING



Thinking of your nonprofit organization as a business might not feel intuitive. In fact, due to the mission-driven nature of nonprofit work, it may even feel uncomfortable.

However, our experience has shown that taking this approach is critical to the success of your organization.

Rather than “putting profit before people,” thinking of your nonprofit as a business is the key to focusing your organization’s mission — and determining the amount of funding required to achieve it.

***Fundraising is a core aspect of a nonprofit organization's business.***



Saad&Shaw offers comprehensive services that meet the fund development and fundraising needs of nonprofit organizations, institutions of higher education, and those in philanthropy. We will recommend a plan of action that is tailored to:

- ▶ Who you are as an organization
- ▶ What you truly want to accomplish
- ▶ Your current capabilities
- ▶ What you believe it will take to achieve your goals

When nonprofits reach out to us, they often have questions about the fundamentals of fundraising — but they don't know who to turn to for guidance. For example:

- ▶ How do I create sustainability for my organization?
- ▶ Why isn't my board engaged in fundraising?
- ▶ Is this the right time to raise money?
- ▶ How much do you think I can raise?
- ▶ Help! My board wants to launch a big campaign.

***We evaluate your fundraising efforts and identify areas for improvement.***

Once you've shared your organization's vision, needs, and challenges with us, our team will:

- ▶ Assess your current fundraising goals, capacity, infrastructure, and leadership.
- ▶ Coach you through the fundraising process and help you make the connections you need to grow your organization.
- ▶ Create key strategies tailored to support your growth, success, and sustainability.
- ▶ Guide you through the process of building a fundraising team that includes staff, board members, and influencers.



# Our Services

We offer a menu of services, each of which can be customized to best meet the needs of your organization.

We typically recommend starting with **counselOnDEMAND** to assess your capabilities and explore pathways to your desired future.

When you combine **counselOnDEMAND** with our case for support service, you will have a strong foundation from which to move forward.

These services can be followed by a feasibility study where we test your case for support amongst stakeholders.

Next, we recommend the creation of a campaign plan, which is vital to charting your path forward.

Other services include:

1. Workshops to build your fundraising capacity
2. Case for Support Cohort
3. **counselInRESIDENCE**
4. Strategic Directions

# counselOnDEMAND

When you begin your partnership with us, we'll recommend our counselOnDEMAND service.

Through counselOnDEMAND, we'll invite you to share your visions, challenges, questions, and anything else you'd like to discuss when it comes to your fundraising goals and priorities. We'll listen, ask questions, listen some more, and, finally, offer guidance to help you determine how you can best build your team to achieve those goals.

Utilizing this service, we've partnered with diverse nonprofits — from grassroots organizations to universities and professional associations to emerging philanthropies. Whether you're an experienced fundraiser, or you've just taken a role as a college president and are new to fundraising, we'll work with you as thought partners, coaches, and strategists.

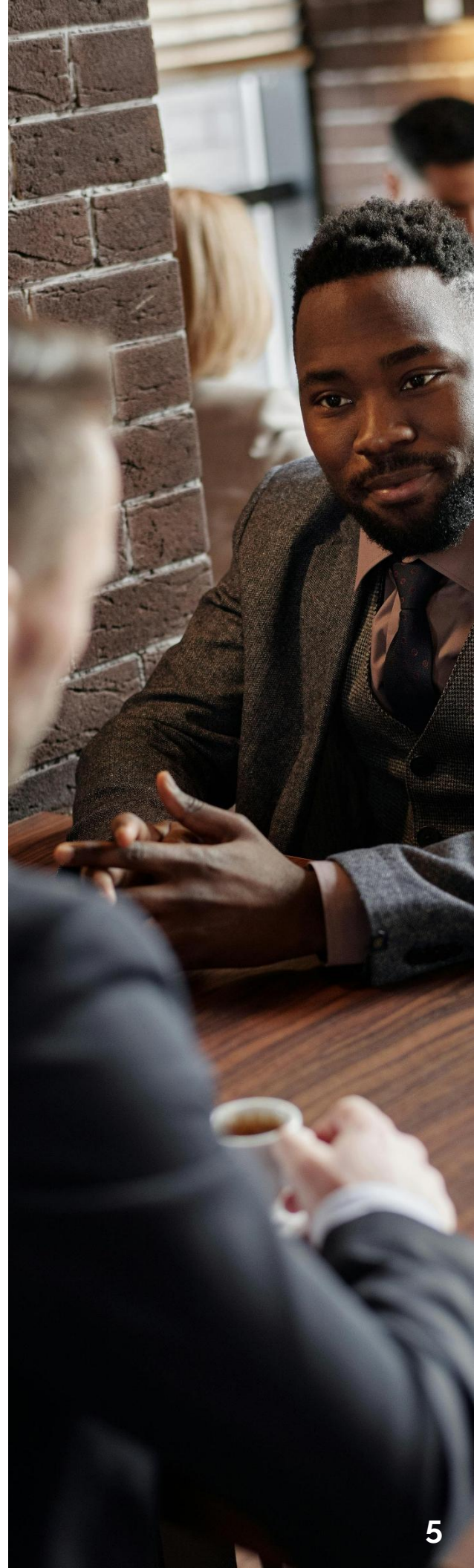
Tactically, we'll help you develop consistency when it comes to your fund development and fundraising activities. Strategically, we'll help you identify and engage resources and relationships.

As the first step in our work together, we will begin the process of creating a sustainable framework for the long-term health of your organization.

## *Expert advice on call.*

We offer our counselOnDEMAND service in periods of one, two, and three months.

Through the program, you'll receive access to fundraising and fund development expertise that is tailored to your needs and vision. You can opt for either one-on-one or group sessions with your staff, board members, and other individuals who are critical to your fundraising goals.



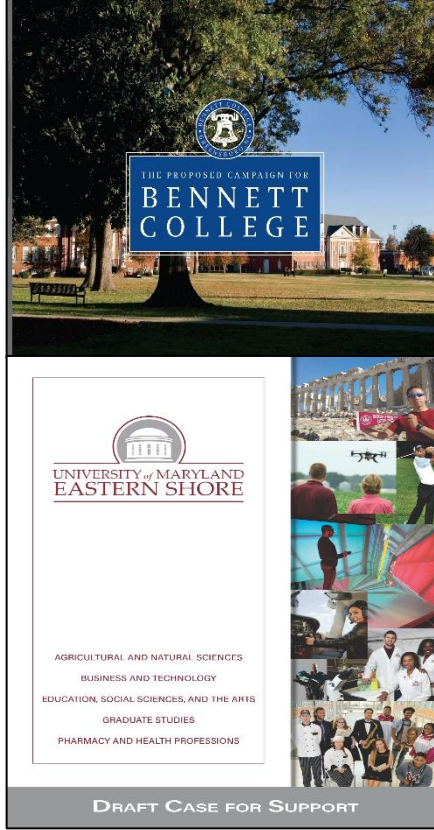
# Case for Support

The case for support is a must-have for nonprofit organizations and institutions.

Much more than a storytelling donor engagement piece, the case is a nonprofit "investment prospectus," created to share with those who can give or influence resources at the highest level.

It must be clear, concise, and compelling, as well as data-driven and visually engaging.

Our process allows you to create a case for support that proactively answers the questions that major donors and funders will want answered before they invest in your organization.



# Ida B. Wells

"A Life and Legacy worthy of Honor and Celebration."

\$250,000 Fundraising Goal

Agape 2021-2022 | Join The Movement. COMPREHENSIVE FUNDRAISING CAMPAIGN



*The case for support is at the heart of all fundraising.*



Don't worry about whether you are up to the task — we'll work with you and your team to clearly define and communicate your fundraising goals, timeframes, and unique impact. That means we'll ask you critical questions — and make sure your case for support answers them.

In addition to individual organizations and institutions, the Saad&Shaw Case for Support Cohort is available to funders and philanthropists who want to help build the fundraising capacity and infrastructure of nonprofits they believe in.

# Fundraising Feasibility Study

Before you begin implementing your strategic plan – and before you begin your fundraising – you need to explore where the funding will come from. The process of testing your vision, fundraising priorities, and anticipated impact with those who can provide resources is known as a feasibility study.

We specialize in feasibility studies for higher education capital and comprehensive campaigns and provide feasibility services scaled to meet the needs of smaller nonprofit organizations.

The feasibility interviews and resulting report help ensure that you launch your fundraising at the right time, targeting the right people with the right case for support.

We will work with you to create the right study for your needs and budget.

## counselCARE

With **counselCARE**, we become a member of your team. We coach staff, board members, and volunteer leadership on a regular basis. We work with you to implement the findings of your feasibility study and launch your fundraising campaign.

We offer strategies for engaging campaign leadership, identifying potential donors, and developing suggestions for how to engage new or continuing donors.

We assist with accountability, offering timeframes for the important activities that comprise a campaign.

Our unique **counselCARE** service can be secured for a timeframe that works for you: three months, six months, or more.

# Fundraising Campaign Plan

A Saad&Shaw fundraising plan is a comprehensive, detailed roadmap that can be used to plan for, launch, and manage your fundraising. It combines the findings from your feasibility study with our experience and creativity.

It is a management tool that can be used to recruit – and retain – volunteer leadership, while focusing the work of fundraising staff, the executive director, and the board. It is not a spreadsheet, an overview, or a list of suggested actions.

By using this unique tool, you'll be able to manage and evaluate your cultivation and solicitation strategies while measuring your fundraising progress.

We will work with you to design a plan that optimizes your strengths and helps you address any challenges that may be hindering your fundraising success.





## Workshops to Build Your Fundraising Capacity

Our FundU program offers workshops that help build fundraising capacity and strengthen team engagement. These include:

- ▶ How to Create Your Case for Support
- ▶ Prerequisites for Fundraising Success
- ▶ Fundraising Responsibilities of the Executive Director

We also create custom learning sessions for boards, staff, and volunteers. When you need to engage your team in fund development and fundraising, call on us! We will create a workshop to meet your needs.

### Case for Support Cohort

*Special service for philanthropists, foundations, and granting agencies.*

If you want to support the fundraising capacity and infrastructure of the nonprofits you fund – or want to fund – we can help through our case for support cohort.

How does it work? You select up to six organizations you believe could benefit from working with a case and we will work with them as a group and individually, sharing the importance of the case for support and guiding their own case development.



### counselInRESIDENCE

When 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.

Our counselInRESIDENCE delivers decades of fundraising expertise directly to your team, condensing months of planning into a powerful, fully customizable engagement that produces immediate results while building sustainable growth.

This service is also available as **Executive counselInRESIDENCE** for work with HBCU presidents, cabinet members, trustees, and volunteers.

### Strategic Directions

Changing times require reassessment. Is it time to shift, stay the course, or something in-between?

Through our Strategic Directions offering, we will work with you to review your mission, vision, leadership, and programs. We will explore the extent to which these remain relevant and how they may be improved, replaced, or refined.

Insights from board, staff, stakeholders, funders, and those served or advocated for are always included.

We document what we have learned – and what you have agreed to – creating a tool that can help guide your work going forward.



# Mission

To provide accessible, affordable, and quality fundraising counsel to nonprofit organizations, institutions of higher education, and philanthropists who are committed to expanding the fundraising capacity of the sector.



# Vision

Saad&Shaw exists to help its diverse clients become more creative, more efficient, more capable, and ultimately more self-sufficient, so that they may achieve success in all areas – including fundraising.

# Who We Are

Saad&Shaw assesses, designs, builds, and supports fund development programs. We create multi-year, customized fundraising plans to guide and coordinate your fundraising activities and strategies. Let us help you assess your fundraising, engage your board, tell your story, and sustain diverse teams.

## Our Fundraising Philosophy

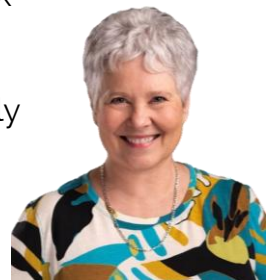
We believe that fundraising is most successful when it is volunteer-led, with strong management and leadership provided by the president, CEO, fundraising staff, and the board. As fundraising counsel, our role is to prepare your team to engage volunteer fundraising leadership, to provide you with guidance related to your organization's infrastructure and capacity, and to offer you coaching and strategy that is specific to your needs and opportunities.

## *Trust is at the core of all our engagements.*

When we work with an organization, we seek first to create an atmosphere that supports open communication. We ask questions. We listen. We ask more questions. We answer yours. We give you our honest assessment regarding options for you to consider, as well as suggested next steps.

Mel and Pearl helped us think very strategically about our \$25M campaign. Everyone's role and priorities were clearly defined and, together, we developed a solid structure.

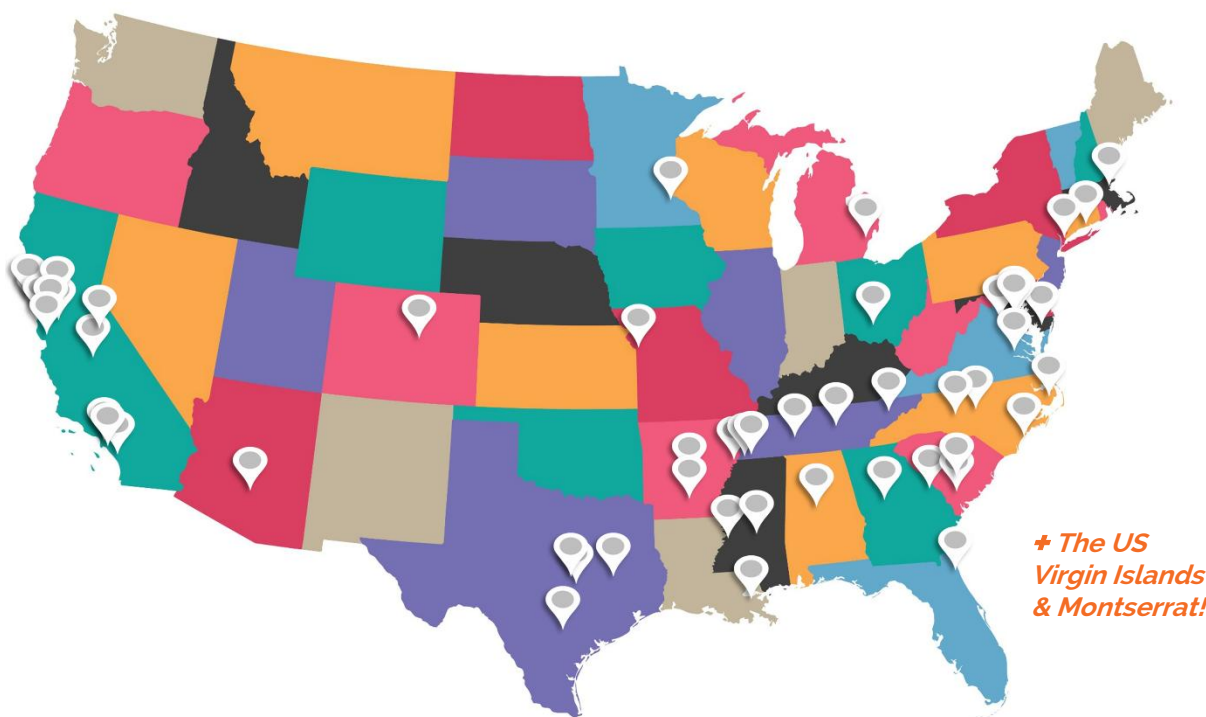
**-Veronique Diriker, Ph.D., CFRE, Former Director of Development, University of Maryland Eastern Shore**



# SERVING DIVERSE ORGANIZATIONS ACROSS THE USA & BEYOND!

- ▶ ARTS ORGANIZATIONS
- ▶ BUSINESSES
- ▶ CHARTER SCHOOLS
- ▶ COMMUNITY DEVELOPMENT CORPORATIONS
- ▶ FAITH-BASED ORGANIZATIONS
- ▶ GOVERNMENT AGENCIES
- ▶ HBCUs
- ▶ HIGHER EDUCATION
- ▶ NONPROFIT ORGANIZATIONS
- ▶ PHILANTHROPY
- ▶ PROFESSIONAL ASSOCIATIONS

**160+**  
**CLIENTS**



“Saad&Shaw are standouts. They provide a more comprehensive level of service to the participants of their workshops, and they truly seek to understand the challenges nonprofits are facing and how to solve them. I can say with 100% certainty that anyone who has attended one of their workshops through Tennessee Nonprofit Network has become far more adept at fundraising and nonprofit management.

**-Kevin Dean, PhD, CEO, Tennessee Nonprofit Network**

# Meet the Founders



## Pearl D. Shaw, MPA, CFRE

Pearl D. Shaw is the president and CEO of Saad&Shaw.

Her experience includes private sector business development and nonprofit fundraising.

Pearl has worked directly with college and university presidents, trustees, and nonprofit executives for over 20 years, providing guidance and coaching in the areas of campaign planning and case for support development.

She has personally conducted feasibility interviews for organizations and institutions across the country; written comprehensive fundraising plans for higher education and nonprofits; and facilitated workshops and training sessions for diverse leaders.

A certified fundraising executive (CFRE), Pearl writes the weekly column "FUNdraising Good Times" and has co-authored *The Fundraiser's Guide to Soliciting Gifts* and *Prerequisites for Fundraising Success*.

## Melvin B. Shaw, Ph.D. *honoris causa*

Melvin B. Shaw, Ph.D. *honoris causa*, is the founder of Saad&Shaw and serves as vice president of creative and strategy.

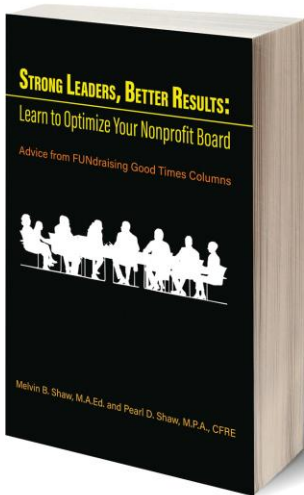
Mel has over 50 years of development and marketing experience. He served as vice president for marketing for UNCF, developing and producing the telethon known as the Lou Rawls Parade of Stars.

He served for 10 years as the executive director of the Texas Association of Developing Colleges, a consortium of six HBCUs. He also served as the vice president of advancement for Charles Drew Medical College.

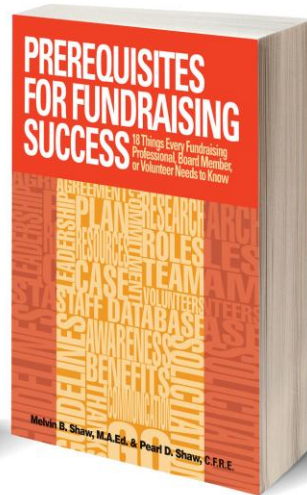
He was awarded a Doctor of Humanities degree from Lane College in recognition of his unique donor engagement and cause marketing programs and their impact on the fields of philanthropy and higher education and the engagement of African American donors.

Mel was also a member of the team that conducted the feasibility study to determine the political, financial, and cultural viability of the National Museum of African American History and Culture.

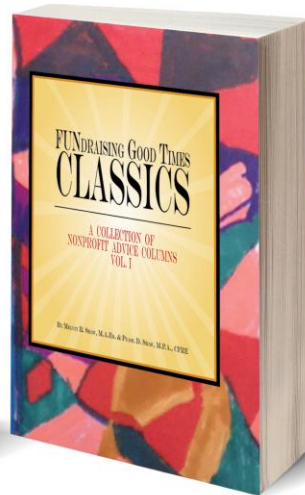
# Saad&Shaw Publications



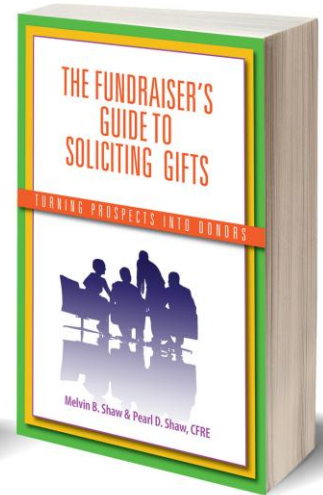
[Strong Leaders, Better Results: Learn to Optimize Your Nonprofit Board](#)



[Prerequisites for Fundraising Success](#)



[FUNdraising Good Times Classics](#)



[The Fundraiser's Guide to Soliciting Gifts](#)

*Check out our weekly blog [FUNdraising Good Times!](#)*



We have formed a valuable partnership based on their deep connections in the nonprofit community, their expertise and enthusiasm for fundraising, and their unmatched professionalism. Oh, and they're really fun people, too!  
-**Robert Fockler, President, Community Foundation of Greater Memphis**

As an executive of a small nonprofit, it's not always easy to find people who just 'get it.' Mel and Pearl are those people! **Within three months, they helped me move from a nice idea to an INVESTABLE idea**, ultimately helping to secure significant funds towards a large project. Their expertise in this field is unmatched. And they are so fun to work with!  
**Ruth Abigail Gardner, Co-Founder & Executive Director, AngelStreet Memphis**



Saad&Shaw served as the right partner for us in developing and synthesizing a comprehensive feasibility study, connecting us more intimately with our funders to gain valuable feedback and insight on how I as President can further garner trust and confidence in our ability to execute on our mission initiatives. We launched a five-year, \$7.5M capital raise of which we have already reached 20% of our goal!  
-**Ron Brooks, President, River City Capital**



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