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# HARTSOOK

Fundraising Counsel Worldwide<sup>SM</sup>





## ABOUT HARTSOOK

Hartsook has a long tradition of helping nonprofits of every size, scope and sector. For over three decades, Hartsook has provided fundraising counsel tailored to meet the specific needs of every organization we serve.

We help our clients unleash the Power of Philanthropy™ through smart counsel and superior strategies.

We are very proud of the fundraising achievements of the nonprofits we serve. We attribute our success to our great attention to detail, with an emphasis on research and an understanding of the impact of each client's mission.

With professionals located throughout the country and abroad, we provide expertise in major gifts, development, management, estate giving, foundation research, proposal writing, communications, executive search, strategic visioning, mentoring and more.

*"Having worked with the Hartsook team for over 10 years, I have always found them to bring structure, discipline and accountability to our work. They provide an invaluable service in equipping our board and campaign cabinet with a deeper understanding of fundraising and major gifts philanthropy. With their support, we have consistently exceeded our goals. They are great partners in philanthropy."*

– Matthew Naylor, PhD, President & CEO, National WWI Museum and Memorial

## WHAT CAN HARTSOOK DO FOR YOU?

Our focus on fundraising education and the advancement of the field translates to superior strategies. Our proven, research-based counsel helps ensure continued, ongoing giving success while building increased support for programmatic, expansion, capital and endowment fundraising.

Whether you are seeking professional counsel and advice for advancing your ongoing fundraising programs or planning to embark on a major fundraising initiative, Hartsook is prepared to help you reach your full potential. As a full-service fundraising consulting firm, we offer a diverse range of services. Our highly skilled fundraising consulting professionals offer proven strategies based on the best experiential and quantitative philanthropic practices.

## FUNDRAISING COUNSEL SERVICES

**Fundraising Counsel.** Hartsook's fundraising counsel services are uniquely tailored to the nonprofit organization's fundraising needs during a major gift capital campaign or on an ongoing basis. In addition to fundraising counsel, we offer full-service fundraising and campaign management. In this campaign arrangement, you know your fundraising efforts are being managed and implemented with the highest level of professionalism and with attention to an efficient use of resources.

Our degree of responsibility during fundraising or campaign counsel varies depending on whether we are retained to provide Nonresident Counsel (average of one to three days per month) or handle the day-to-day tasks as a Campaign or Fundraising Manager (average of ten to sixteen days per month). Our services to advance your fundraising may include the following:

- **Case for Support.** We work with you to develop a compelling case for support—the vehicle through which you communicate to existing and prospective supporters your fundraising plans. As the effort continues, we facilitate the refinement of your case for support to ensure it continues to articulate your plans and reflect your success.
- **Prospect Identification.** We facilitate and guide the identification and review of potential prospects—including individuals, foundations and corporations—for your effort. This identification process may include analyzing your volunteer and donor database and history; roundtable discussions; and/or researching local, regional and/or national prospects; and utilizing the collective knowledge of the firm and other public resources.
- **Cultivation.** We strategize, plan and guide implementation of cultivation activities for major gifts and ongoing fundraising efforts to identify prospects and broaden your base of support. These activities may occur in group settings and individually to build excitement, spread the message and create ownership among those already associated with the organization.



*“We have worked with Hartsook for nearly 15 years and continue to value their experience and advice a great deal. They are a trusted and essential fundraising partner to Open Avenues.”*

– Brenda O’Neal  
Executive Director  
Open Avenues  
Rogers, Ark.

- **Solicitation.** We guide the development of solicitation strategies that maximize every gift opportunity through proper research and cultivation of each prospect, role playing and strategy and board and volunteer training. When appropriate, we participate in the solicitations with your volunteer leaders and administration or conduct the solicitations ourselves, depending on the level of service.
- **Corporate and Foundation Grants.** We conduct targeted research—customized through keyword searches—to surface the best possible grant prospects for your organization. Once identified, we work with you to ensure that grant opportunities deemed appropriate are strategically developed, written and submitted. When appropriate, we facilitate the development of meaningful and long-standing relationships between your organization and foundation program officers.
- **Leadership Recruitment and Training.** We work closely with you to identify and recruit the top-level leadership. After they are on board, we train them as needed to ensure they are prepared to help you achieve fundraising success.
- **Integrating Ongoing Funding.** We facilitate the development of a strong ongoing operating fund while meeting your program expansion, capital and endowment needs. We continually focus on how each component affects the others as annual fundraising and other efforts, such as a campaign, progress.
- **Adherence to Timeline.** We maintain the momentum of the fundraising initiative, motivate volunteers and complete projects according to the established goals and objectives.
- **Communication Strategies.** We develop a consistent message that will engages constituents in your success by sharing the impact of your fundraising. The right message delivered with the right method to the right people energizes your fundraising initiatives.
- **Endowment Development.** Endowment giving is perceived by many to be the most difficult aspect of philanthropy. We embrace this challenge and convert it to an opportunity to allow people to make gifts that provide funding to support your mission and those served by our organization in perpetuity.

## OTHER FUNDRAISING SERVICES

Along with fundraising counsel, Hartsook offers a wide range of services:

**Campaign Planning.** Often, Hartsook is engaged when an organization is considering a campaign or major gift initiative. Many organizations do not raise major gifts on a regular basis. Campaign counsel can provide confidence, experience and focused strategy to guide the success of your campaign. Before undertaking a major campaign, a pre-campaign study is critical. Hartsook's pre-campaign study focuses on ensuring ongoing funding remains the same or increases during the campaign period.

We begin by conducting an assessment that allows us to develop a broad, research-based plan that focuses on building and sustaining relationships to power your success during the campaign and long after. This study involves the following components:

- **Fundraising Readiness Review.** We help gauge how prepared you are to achieve fundraising success. We conduct interviews with key staff and administration and review office systems and processes.
- **Case Statement.** We facilitate the creation of a compelling draft case for support that communicates to existing and prospective supporters your vision and proposed plans.
- **Campaign Assessment.** We gather input from external sources through personal interviews—those close to you and those you hope to engage. We help you identify potential interviewees, who offer their input in person, by phone or online. We work with you to identify a broader prospect pool, and we distribute a mail and/or online survey to obtain input.
- **Final Report.** We prepare a campaign plan, based on the information gathered, that includes specific recommendations and a fundraising blueprint outlining the key elements of your campaign, including a recommended goal, timeline, fundraising structure, budget, staffing plan and policies. We present the study's findings and make recommendations to you and/or your leadership for approval.

**Foundation Research and Grant Writing.** We identify potential corporate and foundation grant opportunities through specialized research and help qualify and prioritize them based on submission deadlines and your needs. One of our grant writing specialists works with those assigned to prepare a final draft for review by the executive director. If appropriate, we participate in on-site visits with funders and facilitate preparation and role playing for each visit.

**Board Training and Leadership Development.** Our leadership training is customized to your needs. It is designed with you to unify, engage and instill confidence for your board members and leadership—whether they are seasoned fundraising veterans or new to fundraising leadership. Through pre-planning and strategy discussions, Hartsook works with you to develop session objectives, outcomes, agendas, support materials and a follow-up report.

*“Hartsook’s devotion to walking with us keeps us motivated to do the necessary tasks to achieve the goal we set.”*

– Kevin Patterson  
Deputy Scout Executive and Chief Operating Officer, Circle Ten Council, Boy Scouts of America

*“Thank you for helping make our 2019 Nonprofit Workshop a success! I hope you overheard all the wonderful comments about your keynote presentation. You provided terrific information for our attendees on what to consider while applying for grants not only for IMPACT 100 but for other such opportunities they come across.”*

– Grants Committee  
IMPACT 100  
Pensacola Bay Area

**Strategic Visioning and Planning.** Through strategic visioning or planning group facilitation with board members and staff leadership, Hartsook works with your organization to develop a consensus about the future of your nonprofit, allowing staff and volunteer leadership to share their ideas, insights and aspirations for the organization in an environment of shared commitment to the mission. We begin by confirming your progress to date and vision for the future; determining priorities; and outlining board committee or individual responsibility. With the support and participation of the board, the strategic visioning work lays the necessary groundwork for creating a strategic plan with specific goals and benchmarks to further your mission.

**Comprehensive Fund Development Plan.** We recommend the development of a comprehensive plan to help focus operational fundraising strategies and develop tactics to support major gift fundraising, including methods of donor engagement. We begin with a focused development assessment that: (1) Defines your development goals; (2) Identifies potential funding sources and strategies; (3) Clarifies your mission and direction; and (4) Translates your vision into philanthropy. A comprehensive fund development plan ensures your communications, operating fund, fundraising events, major and bequest giving, grants and other fundraising strategies are working together most efficiently.

**Executive Search.** Hartsook is uniquely qualified to assess the skills, experience and potential of fundraising and nonprofit management professionals to work well within your unique culture. As your Executive Search counsel, we assume responsibility for all aspects of the recruitment process, including working with you to develop and finalize a position description, the placement of relative advertising and candidate screening, through the recommendation of three to five finalists to be interviewed by your leadership. While the ultimate decision is yours, we participate in the final interviews and provide feedback and advice from our unique perspective and knowledge of your organization and the field.

## RESOURCES TO UNLEASH THE POWER OF PHILANTHROPY™

Hartsook provides nonprofits with professional fundraising counsel, management and expertise including nationally recognized speakers. To schedule a Hartsook consultant to speak or to sign up for Hartsook’s free online resources, email [info@hartsook.com](mailto:info@hartsook.com).

- *eHartsook on Philanthropy*
- *eHartsook on Scouting*
- *Strategies for Success*
- *The Power of Philanthropy*

# THE HARTSOOK TEAM IS READY TO SERVE YOU

## LEADERSHIP



Matthew J. Beem, PhD, CFRE  
Chairman & CEO



Karin Cox, MFA  
President and Co-Founder



Janell J. Johnson, MPA, Executive  
Vice President



Danny Kohrs  
Chief Operating Officer



Ross Pfannenstiel  
Executive Vice President

## CONSULTANTS



Robin Billings  
Prospect  
Researcher



Murray M. Blackwelder, MPA  
Sr. Exec. Vice Pres.



Becky Brown  
Vice Pres.



Geoff Burns  
Vice Pres.



Kristy Burns  
Vice Pres.



H. Daniel Chegwiddden  
Sr. Consultant



Wayne Courtois, MFA, GPC, Vice  
Pres. Grant Writing  
and Research



Keith Cox  
Business  
Development Intern



Donald R. Fry, MBA  
Sr. Vice Pres.



Louis J. Gehring, MM, CFRE  
Exec. Vice Pres.



Dwight Hansen  
Assoc. Consultant



Lynn Hawks, MA  
Vice Pres.



Steve Jones  
Exec. Vice Pres.



Pamela Lawrence  
Assoc. Consultant



Brenda Lesan  
Vice Pres. Grant  
Writing and  
Research



O.J. Rhone  
Assoc. Consultant



Adrian Sargeant,  
PhD, Curriculum  
Consultant



Jen Shang, PhD  
Curriculum  
Consultant



Dave Smith, CFRE  
Sr. Exec. Vice Pres.



Kimera Way  
Assoc. Consultant



Lisa Wiens  
Thompson, DDMin  
Assoc. Consultant



Kevin Williamson  
Assoc. Consultant



Jason Wood  
Sr. Vice President

## ADMINISTRATIVE STAFF



Bruce Adcox  
Transportation  
Specialist



Ashle Burnett  
Business Dev. &  
Support Svc. Assoc.



Lori Cox  
Graphic Designer



Denise Rhoades  
Vice Pres. of  
Communications



Ellissa Rhoades  
Graphic Designer



Laura Rhoades  
Graphic Designer



Tom Waters  
Production  
Supervisor



Tammy Weinman  
Vice Pres. of  
Support Services

# HARTSOOK CONSULTANTS ARE EVERYWHERE TO SERVE YOU



## United States of America

Portland, Ore.	Wichita, Kan.	Shreveport, La.	Boston, Mass.	Wrightsville Beach, N.C.
San Francisco	Kansas City	Minneapolis	New York City	Columbia, S.C.
Santa Barbara, Calif.	Oklahoma City	Milwaukee	Washington D.C.	Greenville, S.C.
Los Angeles	Tulsa, Okla.	Chicago	Richmond, Va.	Charleston, S.C.
San Diego	Dallas	Detroit	Greensboro, N.C.	St. Augustine, Fla.
Phoenix	Columbia, Mo.	Indianapolis	Raleigh, N.C.	Fort Myers, Fla.
Albuquerque, N.M.	Bentonville, Ark.	Columbus, Ohio	Wilmington, N.C.	Miami Beach, Fla.
	Fayetteville, Ark.	Portland, Maine	Winston-Salem, N.C.	Miami

# HARTSOOK

Hartsook | Fundraising Counsel Worldwide | P.O. BOX 410046 | Kansas City, Missouri 64141  
P: 866 630 8500 | F: 866 630 8595 | [info@hartsook.com](mailto:info@hartsook.com) | [hartsook.com](http://hartsook.com)