

PROSPECTUS

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# HARTSOOK





Providing Fundraising Counsel Worldwide, Hartsook has earned a reputation built on insight, integrity and achievement. Our success is based on the success we bring to our clients. Research, knowledge and best practices in the industry are at the heart of everything we do.

Led by Chairman and CEO Matthew J. Beem, PhD, CFRE, Hartsook is one of the largest philanthropic consulting firms in the industry. Since 1987, Hartsook's professionals have provided services to thousands of clients which include campaigns ranging from \$500,000 to more than \$1 billion.

As a full-service fundraising consulting firm, we offer a diverse range of services and enjoy an eclectic client base. Annually, we provide counsel to more than 300 nonprofits—including leading local, national and international organizations—in the areas of social service, higher education, the arts, museums and libraries, healthcare and senior services, youth programs, faith-based institutions, recreation, conservation and more. Our highly skilled fundraising professionals offer sound strategies based on the best experiential and quantitative philanthropic practices.

*Hartsook consultants subscribe to the best practices in philanthropy and fundraising including the Giving Institute's Professional Code of Ethics and Standards and Practices and the Association of Fundraising Professional's Donor Bill of Rights.*

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## UNLEASHING THE POWER OF PHILANTHROPY™

Hartsook helps nonprofit organizations unleash the Power of Philanthropy through creative fundraising counsel while maintaining the highest standards of excellence and ethical practice. When donors, volunteers and nonprofits come together to support and accomplish selfless acts of generosity, the results are exponentially larger. That is the Power of Philanthropy. Our goal is to see nonprofits successfully increase and advance their missions.

### PARTNERS IN PHILANTHROPIC RESEARCH AND EDUCATION



**The Fundraising Standard** is 501(c)(3) developed by Bloomerang Co-Founder Jay Love and Institute for Sustainable Philanthropy Co-Founder and Co-Director Dr. Adrian Sargeant. It provides proper professional fundraising training available to every new fundraiser in North America.



**Institute for Sustainable Philanthropy**, located in Plymouth, United Kingdom, is the global home for fundraising research grounded in the science of philanthropic psychology. It is dedicated to improving the fundraising practice and the philanthropic experience. Hartsook's alliance with the Institute is an expression of the firm's commitment to improving fundraiser education toward a long-term objective of unleashing the Power of Philanthropy in donors, volunteers and fundraisers. Hartsook Chairman and CEO Matthew J. Beem, PhD was appointed as the Institute's first board chair.



**Lilly Family School of Philanthropy at Indiana University** is the world's first school dedicated solely to the study and teaching of philanthropy. IU established the field of philanthropic studies; established the nation's first bachelor's, master's and PhD degrees in the field; and created the nation's first endowed chair in philanthropy – The Hartsook Chair in Fundraising.

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## NATIONAL RELATIONSHIPS

*As a result of our commitment to our clients' success, Hartsook has developed strong relationships with several national organizations and many of their regional and state affiliates.*



Boys & Girls Clubs of America



National School Foundation Association



Boy Scouts of America



Nonprofit Leadership Alliance



Feeding America



Camp Fire USA



The Salvation Army

## OUR TEAM AND LOCATIONS



Our standards are exceptionally high. We look nationwide for proven fundraising professionals with intelligence, knowledge, personality and ethics. Each of our consultants has at least a decade's worth of professional fundraising success; many are accomplished authors, presenters and leaders in our industry.

For a more detailed look at our consultants and staff, please visit [hartsook.com](http://hartsook.com).



### 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

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## COMPANY LEADERSHIP



Matthew J. Beem, PhD, CFRE  
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For full biographies, please visit our website: [hartsook.com](http://hartsook.com).

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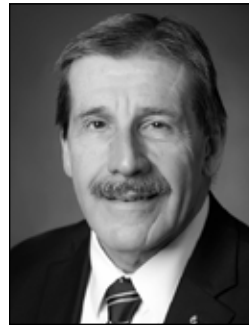


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Other consultants are retained for specific purposes.  
For full biographies, please visit our website: [hartsook.com](http://hartsook.com).



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Other consultants are retained for specific purposes.  
For full biographies, please visit our website: [hartsook.com](http://hartsook.com).

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## HARTSOOK EMERITI

*The following individuals have been conferred emeritus status in recognition of the profound impact and influence they have had on Hartsook and the fundraising profession. Their many decades of service are remembered with admiration and honored with distinction.*

### FOUNDER AND CHAIRMAN EMERITUS



Robert F. Hartsook, JD, EdD, DBA  
*Founder, Chairman Emeritus*  
Wrightsville Beach, N.C.

**H. Layton (Bud) Cooper, DMin**  
*Senior Executive Vice President*  
Kansas City

**Duane Dyer**  
*Executive Vice President*  
San Francisco

**Arthur (Art) Frantzreb**  
*Chairman Emeritus*  
Indianapolis

**Merwyn Hayes**  
*Board Member*  
Winston-Salem, N.C.

**Judith Heasley**  
*Associate Consultant*  
Dallas

**James Mininger**  
*Senior Vice President*  
Heston, Kan.

**Norma Murphy**  
*Senior Executive Vice President*  
Kansas City

**Madelyn (Mandy) Pons**  
*Vice President*  
Albuquerque, N.M.

**Harold J. Schultz, Ph.D.**  
*Executive Vice President*  
Kansas City

**Cynthia Smith-Kelly**  
*Senior Vice President*  
Lee's Summit, Mo.

**Terry Snapp, MA, CFRE**  
*Executive Vice President*  
Kansas City

**D. Mark Stubbs**  
*Senior Vice President*  
Kansas City

**Jim Tangeman**  
*Board Member*  
Wichita, Kan.

**Davoren Tempel**  
*Executive Vice President*  
Kansas City

**Susan Duncan Thomas**  
*Executive Vice President*  
Albuquerque, N.M.

**Stanley Weinstein**  
*Executive Vice President*  
Albuquerque, N.M.

**Jaime Zablah Siri**  
*Vice President*  
San Salvador, El Salvador

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## STRATEGIC PARTNERS AND RELATIONSHIPS

*In our purposeful quest to ensure access to the best fundraising-related services and information, we have developed professional partnerships with some of the most respected names in fundraising, including:*



**Blackbaud** is the world's leading cloud software company powering social good. The organization equips change agents with cloud software, services, expertise, and data intelligence designed with unmatched insight and supported with unparalleled commitment, so organizations can advance their missions.

**Analytics by Blackbaud** takes the guesswork out of a nonprofit's mission by providing insights that drive action and results.

**Raiser's Edge NXT® by Blackbaud** provides software that takes fundraising and donor management to the next level.



**Bloomerang** offers powerful donor management that helps nonprofits retain donors, communicate effectively, find major gift prospects and report on metrics that matter.



**DonorSearch** uses wealth analytics and proven philanthropy to help identify the most customized pool of prospective donors for each organization.

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## BOARD OF DIRECTORS



**Matthew J. Beem, PhD, CFRE**  
**Hartsook, Chairman and CEO**

Matt Beem chairs the advisory board of the Institute for Sustainable Philanthropy in Plymouth, United Kingdom and is a senior fellow of the University of Missouri-Kansas City's (UMKC) Midwest Center for Nonprofit Leadership. He served on the board of trustees of Avila University in Kansas City from 2015-2017 and on

the board of trustees of Graceland University in Lamoni, Iowa from 2008-2014.

Matt is a featured speaker on fundraising and fundraiser compensation in the United States and abroad and is the author of *Performance-Driven Fundraising: Taking Control of Your Success* and a co-author of *\$231 Billion Raised and Counting*. Matt holds a bachelor of journalism in news editorial from the Missouri School of Journalism at the University of Missouri-Columbia and a master of public administration in nonprofit management and doctor of philosophy in organizational behavior and higher education administration from UMKC's Bloch School of Management and School of Education.



**Terrence P. Dunn**  
**Retired, President and Chief Executive Officer, JE Dunn Construction**  
**Founder, DD Ranch**

Terry Dunn retired as CEO of JE Dunn Construction in 2013, and retired from his chairman's duties at the end of 2014. Following his tenure at JE Dunn, Terry founded the DD Ranch Leawood—a business home

for senior executives who have retired from major companies and are staying actively engaged as investors, directors and entrepreneurs in corporate, civic and charitable initiatives.

Terry served as the Chairman of the Federal Reserve Bank of Kansas City, Chairman of the Greater Kansas City Chamber of Commerce, Chairman of the Builder's Association Education Committee, President of the American Cancer Society Central Kansas City Unit, Board Chair of Rockhurst University, Board Chair of KCU and Vice Chairman of the Economic Development Corporation. Over the years, he has been active in many civic and community organizations such as the Boy Scouts of America National Executive Committee, Civic Council of Greater Kansas City, Kansas City University of Medicine and Biosciences, Midwest Research Institute, UMKC Bloch School and UMB Financial.



**Robert D. Regnier**  
**Chairman, President and CEO,**  
**Bank of Blue Valley**

Bob Regnier founded Bank of Blue Valley in 1989. Bank of Blue Valley is a locally-owned and operated community bank with five locations throughout Johnson County. Over the last 29 years, the Bank has grown to over \$725 million in total assets.

Bob is a former Chairman of the Greater Kansas City Chamber of Commerce and is currently active as a member or on the board of directors of the Civic Council of Greater Kansas City, Union Station Kansas City, Kansa Valley Capital, Inc., Johnson County Community College Foundation and the University of Missouri Kansas City Foundation. He has received numerous honors including Philanthropist of the Year, Johnson Countian of the Year, Kansas Citian of the Year, Volunteer of the Year, UMKC Alumni award, NAACP MLK Legacy Award, Ernst & Young Financial Entrepreneur of the Year, Thinking Bigger Business Entrepreneurial Legacy Award and the Henry Bloch Human Relations Award.

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## GLOBAL ADVISORY COUNCIL

**Don Alexander**

President  
Alexander and Associates, Inc.  
Naples, Fla.

**Michelle Barnes**

Executive Director  
Helen R. Walton Children's Enrichment Center  
Bentonville, Ark.

**Sarah Blom**

Executive Director  
Michigan State University  
East Lansing, Mich.

**Sir Stephen Bubb**

President, Oxford Institute of Charity  
President, Charity Futures  
Oxford, United Kingdom

**Doug Cowan**

President/CEO, Community Services League  
Independence, Mo.

**Dave Dennis**

President, Specialty Contractors & Associates, Inc.  
Gulfport, Miss.

**Sam Dunn**

Director of MBA Career Management,  
Marriott School of Business  
Brigham Young University  
Salt Lake City

**Dr. Brian Klaas**

Dean, Henry Bloch School of Management  
University of Missouri-Kansas City  
Kansas City

**Randy Lawson**

Chairman and CEO, LAWCO  
Bentonville, Ark.

**Dr. Marie McCarther**

Associate Professor, School of Education  
University of Missouri-Kansas City  
Kansas City

**Ken McClain**

Partner Attorney, Humphrey, Farrington, McClain  
Independence, Mo.

**Dr. Matthew Naylor**

President and CEO, National WWI Museum and Memorial  
Kansas City

**Dr. Jon North**

Vice President for Institutional Advancement  
MidAmerica Nazarene University  
Olathe, Kan.

**Kevin Patterson**

Deputy Scout Executive and Chief Operating Officer  
Circle Ten Council, Boy Scouts of America  
Dallas

**Joel Ross**

Retired CEO, Universal Electric Corporation  
Pittsburg

**Deborah Sandler**

General Director and CEO, Lyric Opera of Kansas City  
Kansas City

**Dr. Adrian Sargeant**

Co-Director, The Institute for Sustainable Philanthropy  
Plymouth, United Kingdom

**Joanna Sebelien**

Chief Resource Officer  
Harvesters – The Community Food Network  
Kansas City

**Randy Wisthoff**

CEO, President and Director, The Kansas City Zoo  
Kansas City

**Miles Young**

Warden, New College University of Oxford  
Oxford, United Kingdom

**Jaime Zablah-Siri**

CEO, La Factoría Ciudadana El Salvador/Guatemala  
Consul, The Islamic Republic of Pakistan in El Salvador  
Council Member, Santa Tecla Municipality in El Salvador  
San Salvador, El Salvador

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## SERVICES AND PRODUCTS

*Hartsook has a long-standing commitment to include fundraising research and best practices in developing applications that create fundraising opportunity. You will see that many of our services and products have not only been tested by time, but also through practical application and research.*

Our proprietary **Integrated Fundraising Campaign<sup>SM</sup>** is the comprehensive capstone of our service portfolio. It blends the best strategies of capital and endowment campaigns with a goal of increasing operating support. It builds capacity, relationships, confidence and a solid path to long-term fundraising success.

The **Pre-Campaign Study** asks the tough questions, tests the capacity of a campaign and sets the stage for success. This study is an essential first step prior to launching a campaign.

**Capital or endowment campaign counsel** allows you to attract substantial support without compromising regular giving. We facilitate campaign strategy and plan development, as well as the identification, cultivation and enlistment of leadership.

**Initiative fundraising** focuses on strategies and tools to increase your donors and dollars for ongoing operations and programming and can be adapted to regular giving and endowment campaigns.

**Estate planning counsel** provides substantial opportunity for your growth and long-term security. At the same time, a strong estate planning program reduces your reliance on ongoing campaigns and special events.

**Fundraising Management<sup>SM</sup>** is an effective alternative for organizations that want to "outsource" the most qualified, self-managed fundraising professionals. In this relationship, we assign a multi-disciplinary Fundraising Management Team to your initiative. We take full responsibility for successfully leading your development program and are accountable to the established fundraising benchmarks. This approach provides you our full, diverse expertise and gives you confidence that your sophisticated team will not only raise necessary funds, but build relationships for the long haul.



A **Comprehensive Development Plan** delivers a tailored organizational overview for your development plan and fundraising operations. Customized counseling provides targeted observations and detailed recommendations to motivate your organization to raise more money.

**Grant writing support** helps you tackle that important, but often time-consuming, job of seeking foundation and government funding. Besides the writing, we help develop new sources of funding while increasing existing grants through education, research and detail management.

**Board development** prepares and strengthens key volunteers for their role as fundraisers and leaders.

**Training and mentoring** offers formal and informal opportunities for skill building, resource development and problem solving—tools your team needs to strengthen its operations, focus and success.

**Strategic planning** guides your organization through the big picture. It refines vision and mission, relevance and direction, brand and much more.

**Prospect research** helps you identify key individuals with the capacity to provide significant financial support and the potential interest to do so.

**Executive Search candidate identification and screening** helps you define, seek, identify, screen and select key professional and volunteer leadership for your organization.

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## FUNDRAISING BOOKS

From best-selling books to sold-out seminars, Hartsook provides you—and the industry as a whole—outstanding resources for professional development. Our website ([hartsook.com](http://hartsook.com)) includes a current calendar of upcoming seminars and presentations, as well as a list of our writings, case studies, newsletters and books. Books can now also be found on Kindle.



***\$231 Billion Raised and Counting***  
(co-authors Robert F. Hartsook, Matthew J. Beem and Karin Cox) brings together insights from the many consultants who make up the extraordinary Hartsook team.



***On the Money!***  
(Robert F. Hartsook) is a collection of success stories and lessons learned from 25 nonprofit fundraising campaigns nationwide.



***Fundraising Leadership: The Essential Guide for Nonprofit Board Members Who Want to Make a Lasting Difference***  
(Karin Cox) is the definitive source for empowering board members to become pro-active fundraising leaders.



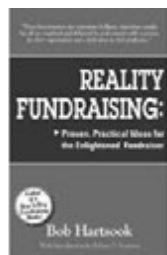
***Nobody Wants to Give Money Away!***  
(Robert F. Hartsook) "... but people do want to invest in making positive changes in the world." This book explores nine fundraising truths essential to success.



***Performance-Driven Fundraising: Taking Control of Your Success***  
(Matthew J. Beem) serves as an insightful reference tool for new and seasoned fundraisers.



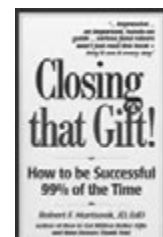
***Getting your Ducks in a Row!***  
(Robert F. Hartsook) shares the recipe for success that no development officer should be without—providing a tool box of strategies for effective campaign fundraising.



***Reality Fundraising: Proven, Practical Ideas for the Enlightened Fundraiser***  
(Robert F. Hartsook) features great ideas, insights and lessons learned through hundreds of best practices from nonprofit professionals nationwide.



***How to Get Million Dollar Gifts and Have Donors Thank You!***  
(Robert F. Hartsook) recounts 101 strategies of amazing real life stories of million dollar or more gifts.



***Closing that Gift!***  
(Robert F. Hartsook) reveals the "29 secrets" to closing a gift and avoiding the "top 10" solicitation mistakes.

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## OTHER RESOURCES

### NEWSLETTERS

To subscribe to *Strategies for Success*, *eHartsook on Philanthropy*, *The Power of Philanthropy* and/or *eHartsook on Scouting*, email [info@hartsook.com](mailto:info@hartsook.com).

***Strategies for Success*** – Offers smart ideas from our consultants.

***eHartsook on Scouting*** – Highlights Hartsook's work with Boy Scouts of America.

***eHartsook on Philanthropy*** – Highlights the success of Hartsook's clients.

***The Power of Philanthropy*** – Conveys inspiring messages about philanthropy, fundraising and the power of relationships.

**THE HARTSOOK BEST PRACTICES** is a collection of insights and techniques gained through decades of research and fundraising experience. You can download Hartsook Best Practices related to fundraising identification, qualification, cultivation, solicitation and appreciation from our Resources page at [hartsook.com](http://hartsook.com).

### OTHER RESOURCES

Philanthropy and related issues generate significant research and study. Our professionals' views are widely solicited by national publications, magazines and journals. Among the topics about which we have written: regular giving, capital campaigns, endowments, grantsmanship, research, planned giving, cultivation, solicitation, board development, philanthropic management, volunteerism, major gifts, marketing and recognition.

### SEMINARS AND SPEAKING ENGAGEMENTS

Hartsook's professionals are invited regularly to present at regional and national conferences. We consistently receive high reviews for insight, motivation, practicality and engagement. A calendar of our upcoming seminars and speaking engagements is available at [hartsook.com](http://hartsook.com).





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# HARTSOOK

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