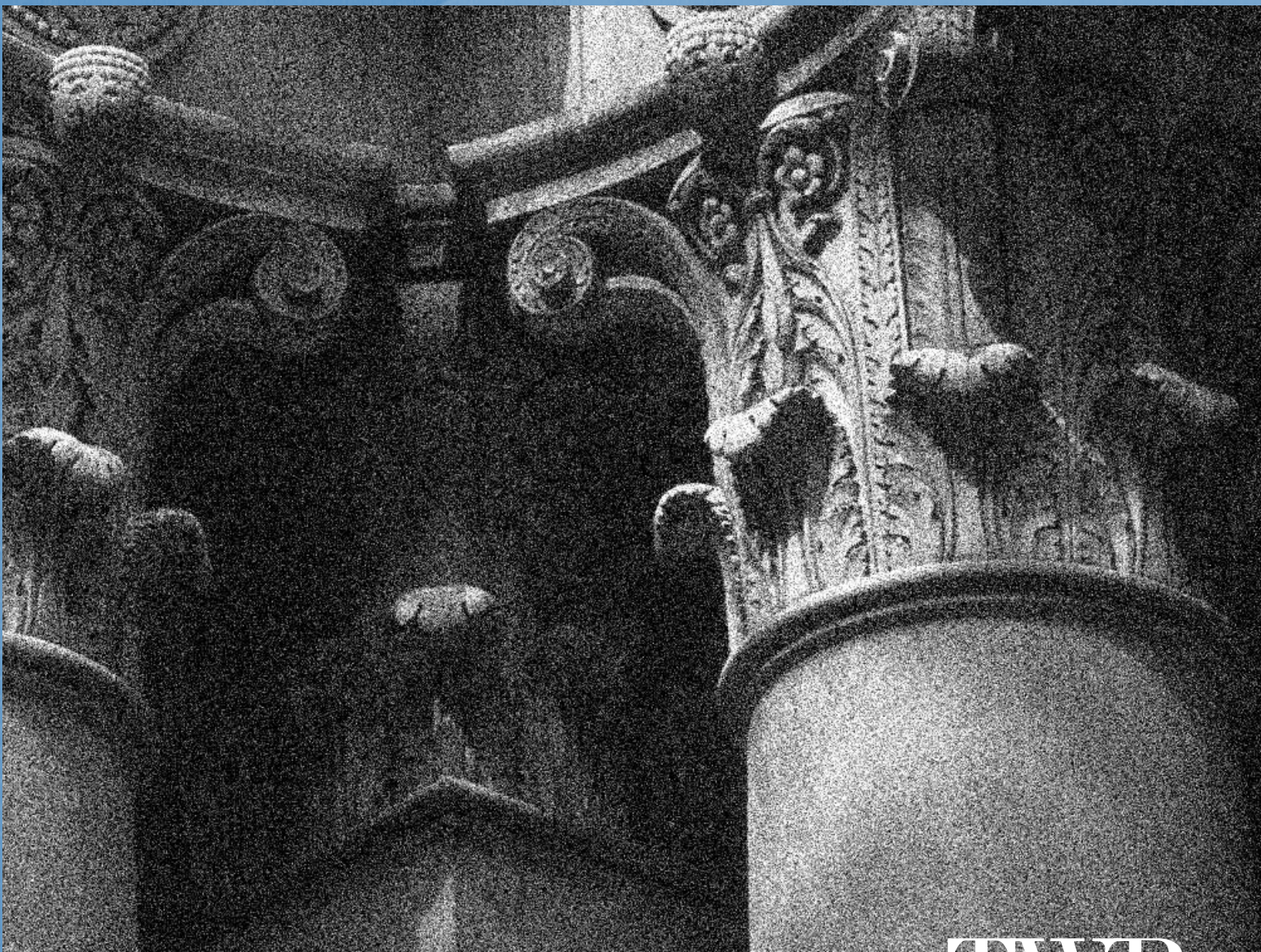


Ter Molen Watkins & Brandt

Strategies. Solutions. Success.



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Seniority

A team skilled in the broad array of development disciplines. Knowledge drawn from experience as advancement officers at nonprofit organizations large and small, local and nationwide. A robust record of achievement.

The product of two entrepreneurial firms, Ter Molen Watkins & Brandt offers innovative strategies and highly effective and comprehensive solutions to help you achieve long-term success in today's uncertain, complex economic environment.

Whether your nonprofit is highly sophisticated or newly developing, we welcome the opportunity to help your organization build on its strengths, and define and overcome its weaknesses. As your candid sounding board and personal advisor, we can assist you in achieving direction, true vision, and firm financial footing for your organization's future.

Significant and successful experience is vital to determining the strategies and solutions necessary for success.

The TW&B Difference

Successful, Real World Experience

At Ter Molen Watkins & Brandt, we believe that our experience speaks for itself. Every consultant has senior-level development experience formed as advancement officers for an impressive array of nonprofits. As such, we provide consultation backed by hands-on fundraising experience and proven track records. Our diverse backgrounds encompass higher education, independent schools, major cultural organizations, social services, religious institutions, and health care agencies across Chicago, the Midwest, and the country.

Being Senior Means Being Seasoned

At Ter Molen Watkins & Brandt, being senior means being seasoned. We know what it takes to work successfully with high-level staff and board members because we've been there. Protocol and productivity go hand-in-hand. We recognize the importance of demonstrating respect across all levels of an organization to ensure the best outcomes.

All of the consultants in the firm have served or are serving currently on nonprofit boards and professional associations themselves. At a large social service agency. A major public television station. An international education foundation. A nationally-known animal welfare agency. A small liberal arts college. A theological seminary. A variety of associations for nonprofit and advancement executives. Such involvements are important for maintaining and challenging perspective.

We believe philanthropy is very much a lifelong commitment, not just a chosen profession.

The Best is Always Available

At Ter Molen Watkins & Brandt, we are the right scale for personal service, whether you are a highly sophisticated organization or a newly developing nonprofit.

In today's virtual world, excellence doesn't have to be under one roof anymore. But it does have to be at your fingertips. In addition to providing you with senior – and only senior – consultants with an impressive depth and breadth of experience, we have access to the finest writers, researchers, designers, and technicians in the nonprofit marketplace. We assemble the right team for the right job.

We offer the right skill set to suit your specific needs. We match the right personalities for the most productive fit. Project by project. Client by client.

Access to the Top

At Ter Molen Watkins & Brandt, our clients can access our collective experiences and insights for even broader perspective and selection. It means we build consensus in planning and strategizing as a team – before we go “public” with anything.

Front and Center and Behind the Scenes

At Ter Molen Watkins & Brandt, we believe that being highly professional and ethical consultants means demonstrating flexibility in our ever-changing roles as leaders, collaborators, and trainers within your organization. Invaluable objectivity and candor. Insightful and professional analysis. A comprehensive approach that helps your nonprofit perform at higher levels of excellence. We also know how to leave our own egos at the front door. We don't just tell you what to do; we help you do it. *In other words, we know how to work for you: by working with you.*

There is Nothing Boilerplate About Us

At Ter Molen Watkins & Brandt, we approach each client as if we were joining the organization as officers with responsibility—we assume a high degree of accountability in everything we do. We design and implement customized plans—not just boilerplate responses. This comes down to good listening and understanding the unique characteristics and distinct requirements of each one of our clients.

We welcome the challenge of creating something new—rather than recycling the same strategies and documents. We just don't work that way.

How Do We Define Success?

At Ter Molen Watkins & Brandt, we are more interested in building our client's own capacities than building a portfolio of lifetime retainers. Too often the line is crossed between providing counsel and creating dependence. Success means taking our clients to the next level of achievement—helping them to overcome organizational weaknesses and capitalize on strengths. Helping them fulfill a vision they have for their organization and the constituencies they serve. Nurturing the strategies and solutions they need for success. We also take great pride in our own firm's success. In a few very short years, Ter Molen Watkins & Brandt has found its own niche in the philanthropic marketplace. This is because our clients recognize the Ter Molen Watkins & Brandt difference. And we think our client list speaks for itself.

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Portfolio of Consulting Services

Our portfolio of consulting services provides your organization with plenty of options.

We can assist you with short-term projects, specific initiatives, longer-term partnerships with your organization—and everything in between.

Providing good counsel means letting you select and maximize the relationship you have with our firm—and allowing the Ter Molen Watkins & Brandt difference to work for your organization.

Campaign Planning and Oversight

The Development Assessment

A Development Assessment is often the first important step in preparing internally for a major fundraising campaign. If you are not planning for a campaign, the Development Assessment can help solve other fundraising challenges within your organization, and identify unrealized opportunities, as well.

How does the Assessment work? We will conduct interviews with key personnel and volunteers. Examine internal and external fundraising materials. Analyze records and research recent activity. Evaluate your organizational structure. Assess attitudes and morale among your staff and leadership. Take a hard look at your marketing efforts and past fundraising effectiveness. Share best practices based on our experience in the industry. Address head-on the issues that inevitably surface during the investigative process.

We will prepare recommendations and present short-term and long-range strategies, all designed as a road map to help you achieve organizational success. And, we will work with you to ensure that effective implementation of our recommendations and strategies takes place.

The Campaign Feasibility Study

A Campaign Feasibility Study gathers the external information needed to determine whether or not your organization will achieve success in a major fundraising campaign. It also provides a solid framework for initiating and moving your campaign forward.

Good fundraising does not happen in a vacuum. It is important to know how your potential volunteers and donors will react to your plans before launching your program. It is important to learn the facts, attitudes, and concerns that could make or break your campaign.

Our Campaign Feasibility Study provides the critical planning information you need to strategize effectively for your campaign – from the nuts and bolts of schedules, goals, and gift charts, to defining the very vision and essence of your organization.

We will help you determine the potential of your organization for raising significant funds. Identify campaign leadership. Articulate and quantify your dollar goals. Analyze and prioritize the objectives of your campaign—in ways that are most convincing to prospects. Draw

conclusions and provide meaningful recommendations regarding your fundraising effort.

We accomplish this through in-depth interviews with those who are closest to your organization – board members and staff, as well as key potential donors and campaign leaders. We oversee the development of the initial written case for support, which tests the most compelling components of the campaign, articulates the needs, and discusses the financial objectives. We create the plan for recruiting top campaign leadership, and identify major sources of philanthropic support.

Most importantly, we provide you with specific recommendations and very concrete next steps. Not just a mass of information that you would rather run from than act upon.

Campaign Counsel

We are proud that the majority of our clients have put our feasibility study recommendations into immediate action for immediate results. For some, current organizational leadership and staffing are sufficient to direct a major campaign from within. For others, outside counsel is critical to maintain momentum, enhance internal expertise, and ensure effectiveness.

We stand ready to provide you with ongoing counsel throughout the duration of your campaign—periodic support whenever needed, or general trouble-shooting as requested. The partnership is yours to define.

Development of the Case for Support

A Case for Philanthropic Support outlines the compelling reasons why a campaign is needed, why it is needed now, who will lead the effort, what financial requirements are needed to meet the goal, and so on. The fully developed case statement serves as the font from which you will draw your campaign proposals, letters, and other promotional materials. We will help you draft this important document and, if needed, assist you in identifying and articulating the key issues that will make up your case for support.

We offer the right skill set to suit your specific needs.

Institutional Planning

Our firm believes strongly that all nonprofits have two choices: plan for growth, or plan for decline. Through highly developed methods and strategies, Ter Molen Watkins & Brandt engages all essential leaders and stakeholders in integrated planning efforts that stem from the very mission of the institution itself.

We can work with you in a variety of ways and through every phase and type of planning effort, including:

Leading and Organizing a Long-Term Strategic Planning Effort

We can help you organize and lead the process, and stand ready to serve as facilitators for the process itself. This may involve ongoing meetings with Board members and staff, an extended planning retreat for key leaders, and/or the formation and guidance of committees and subcommittees with specific planning responsibilities. We are also available to coordinate volunteer and staff activity as the effort moves from strategic plan to actual accomplishment.

In addition we conduct a host of other types of seminars, workshops, training sessions, and Board retreats, and are eager to help you in any way we can.

The Situation/Organizational Analysis

Like the Development Assessment, the Situation or Organizational Analysis provides a description of your institution's current fundraising capabilities and resources, and then determines the organization's adequacy and appropriateness in light of stated or intended goals. The Analysis includes an inventory of organizational structure and by-laws, volunteer leadership and personnel responsibilities, office capabilities, available human and program resources, and operating budgets. The deliverable is an assessment of these factors in terms of current institutional fundraising priorities and institutional readiness for the rigors of an aggressive fundraising effort.

Advancement Reviews and Assessments

The Annual Giving Assessment

The Annual Giving Assessment is a chance to "tune up" your annual fund for maximum effectiveness. We evaluate both qualitative and quantitative data on your existing efforts—including telemarketing and direct mail—to determine what is limiting your success and recommend program enhancements as appropriate. We also help you strengthen and market your giving clubs.

If you manage a membership program or wish to begin one, Ter Molen Watkins & Brandt can help you enhance your program to broaden your base of support and maximize the total yield from each of your current constituents.

The Major and Planned Giving Assessment

The Major and Planned Giving Assessment is designed to help you develop prospect review and solicitation strategies; create and implement marketing, training, and evaluation tools for building or expanding your planned giving program; and leveraging strong annual fund programs which are the base of major and planned giving initiatives.

The Corporate and Foundation Relations Assessment

This Assessment can help you determine the nature and extent of your reach into the institutional giving community. Specifically, we can help you conduct preliminary research on qualified corporate and foundation leads, develop strategic grant solicitation approaches, and even draft full grant proposals with all necessary supporting documents.

The Development Communications Assessment

The Development Communications Assessment includes the development and composition of a case for support, annual, planned giving and capital campaign marketing materials, key internal and external fundraising reports, and presentation resources.

Market/Prospect Assessment

Like the campaign feasibility study, the Market or Prospect Assessment helps you identify and evaluate targeted prospective supporters from among your individual, corporate, and foundation constituents (both actual and potential). We conduct research to determine each constituent group's receptivity to institutional plans, recognition and acceptance of intended roles, interest in priority initiatives, and willingness to offer human and/or financial capital to ensure the plan's success.

Personnel Assessment

The Personnel Assessment is an evaluation of current staff resources in light of established or anticipated fundraising goals at the institution-wide or program/unit level. The study, however, is not a performance review of any individual or group. Rather, it is an assessment of strengths and limitations in staff resources and responsibilities, and a recommendation of possible measures for positive change and increased effectiveness.

Board and Volunteer Leadership Development

Ter Molen Watkins & Brandt provides Board and volunteer leadership initiatives aimed at improving the following areas:

Board Organization and Structure

We can help strengthen your Board's governance capabilities and give members a heightened sense of meaningful engagement by assessing and/or establishing sound officer roles, committee structures, and operational standards for the governing body.

Board Recruitment and Retention

While our firm cannot promise to deliver influential leaders to any organization's Board, we can help identify and screen potential candidates from among an institution's constituents and contacts. We can also develop job descriptions, membership criteria, and offer other strategies to ensure that recruitment activities are successful and that mutually agreed upon expectations are clearly understood and communicated to potential and existing Board members.

Board Training and Support

Our firm helps Board members and other key volunteers perform their roles and responsibilities with confidence and skill by offering general and group-focused services such as facilitating focused meetings and retreats. We also work with individual Board members and volunteers to develop fundraising skills such as prospect cultivation and solicitation techniques.

Executive Search

We have quite a track record for identifying top-notch chief executive officers and senior-level development staff. Through our extensive regional and national network of organizations, institutions, and professional affiliations, we know how to recruit proven leadership.

We will consult with your senior management and board leadership to determine the type of candidate being sought. We then prepare a position description for distribution to contacts and candidates. After conducting prospect calls, preliminary interviews, and reference checks, we present a minimum of three top candidates to your organization. We also help you negotiate an appropriate compensation package.

Our guarantee is that if the selected candidate leaves your organization within six months after the date of hire, we will conduct a second search for no additional charge except for out-of-pocket expenses. We are that certain of our ability to find the right match for you.

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Principles of Service—Our Commitment to You

What makes Ter Molen Watkins & Brandt the right choice for your nonprofit organization?

To begin with, our consultants provide a proven level of competence, knowledge and skill that a wide variety of institutions have relied upon to help achieve and, in many cases, exceed their goals. We also bring to each assignment our commitment to you:

- *We hold your interests as our highest priorities.*
- *We view your institution as distinctive and tailor our role to your needs.*
- *We work closely with you to design a program that best fits your needs.*
- *Our work is individualized to match your organization's resources and character.*
- *We are ethical and thoughtful in our practices.*
- *We charge fair prices.*
- *We are successful only when you are successful.*
- *We don't just tell you what to do – we help you do it.*
- *We help build the capacity of your development staff to perform at higher levels of efficiency and effectiveness after our term of service is completed.*