

**EXPERIENCE
THE DIFFERENCE
BETWEEN GOOD
AND GREAT
PHILANTHROPY.**



PHILANTHROPY. Where does it begin?

With passion, of course.

Your commitment to support something you believe in.

Your desire to reach out and help.

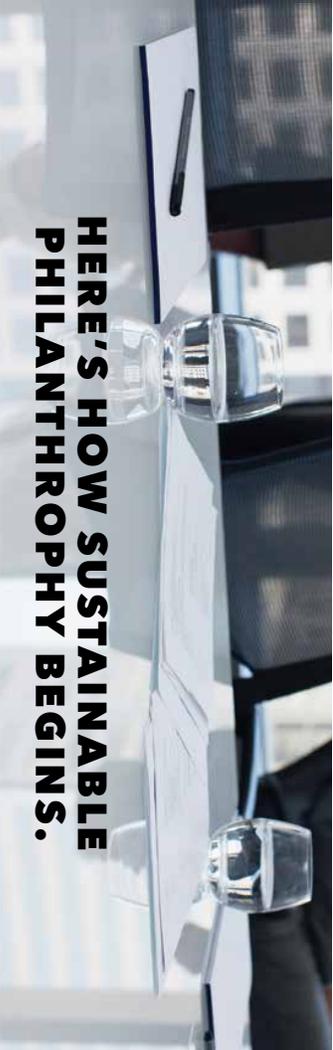
Now, translate that passion into action.

But you don't have to go it alone.

The Abbey Group can help. With Sustainable Philanthropy, the Abbey Group turns every appeal into a never-ending story. With results that are phenomenal.

We are philanthropy management experts steeped in the principles of charitable giving.

Trust us to present your cause with a laser-like focus on the people who share your passion.



HERE'S HOW SUSTAINABLE PHILANTHROPY BEGINS.

To the people who will make it possible for you to surpass your philanthropy goals.

We start by developing a case statement that defines your organization's principles.

Is it a capital campaign? Endowment building? A special appeal? Or something else?

Your case statement is a story that touches on the emotions that connect people to your cause. This connectedness will drive the appeal. A case statement should be factual, truthful, and engaging. (Remember that people will be asking people.)

But the case statement is only the beginning.

So, what's next?

We talk to people: your potential donors and prospects. And we listen.

Through personal interviews. Focus groups. An online survey. (It's called a feasibility study. Its purpose is to set the stage for your appeal. To focus your efforts and maximize your investment. It's the first marketing effort of the appeal.)



HOW?...WE LISTEN.

You'll know before you begin whether or not donors and prospects agree with your appeal direction – leaving time to tweak the details if necessary. Soliciting money is both an art and science.

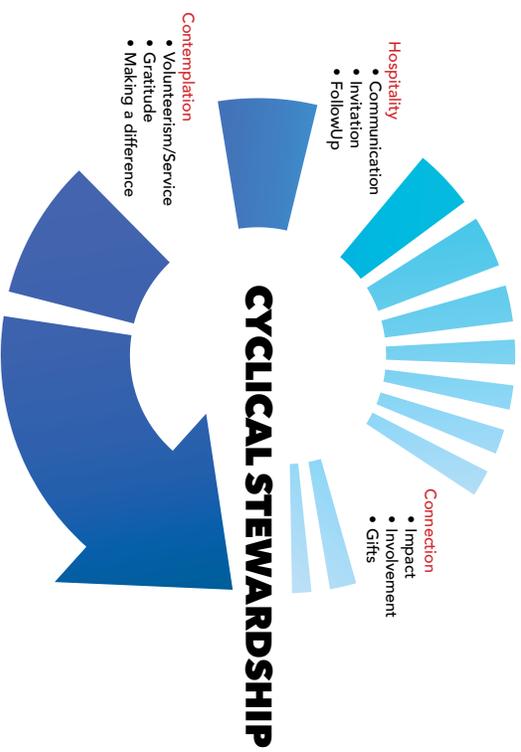
The science encompasses the pledge redemption process, thank you letters, mailings, and more. The art is the process of matching a prospective donor with a compelling cause.

The Abbey Group will focus on both.

Then we find who will lead the appeal, because raising money requires leaders. Get to work building the committee who's committed to the cause, just like you are. The steering committee provides insight on key issues about your philanthropy effort – key issues like campaign objectives, budget, communication, volunteer recruitment, and resource allocation. Other leaders and volunteers will follow their direction.

And although philanthropy always requires creativity, proven steps and actions are taken to ensure success. The Abbey Group suggests the following:

- Develop a comprehensive appeal plan with goals, action items, and deliverables
- Write a comprehensive case statement and create related materials – these important tools are necessary for education and cultivation
- Develop a committee structure for the appeal and begin recruitment of key volunteers
- Complete training materials
- Begin training and motivation of leadership volunteers (continue throughout all phases)
- Begin prospect identification and research
- Identify prospects for early solicitation/lead gifts
- Solicit early major gifts and significant lead gifts



This will give you an idea of who you can count on for a major gift today.

But what about tomorrow? Or forever?

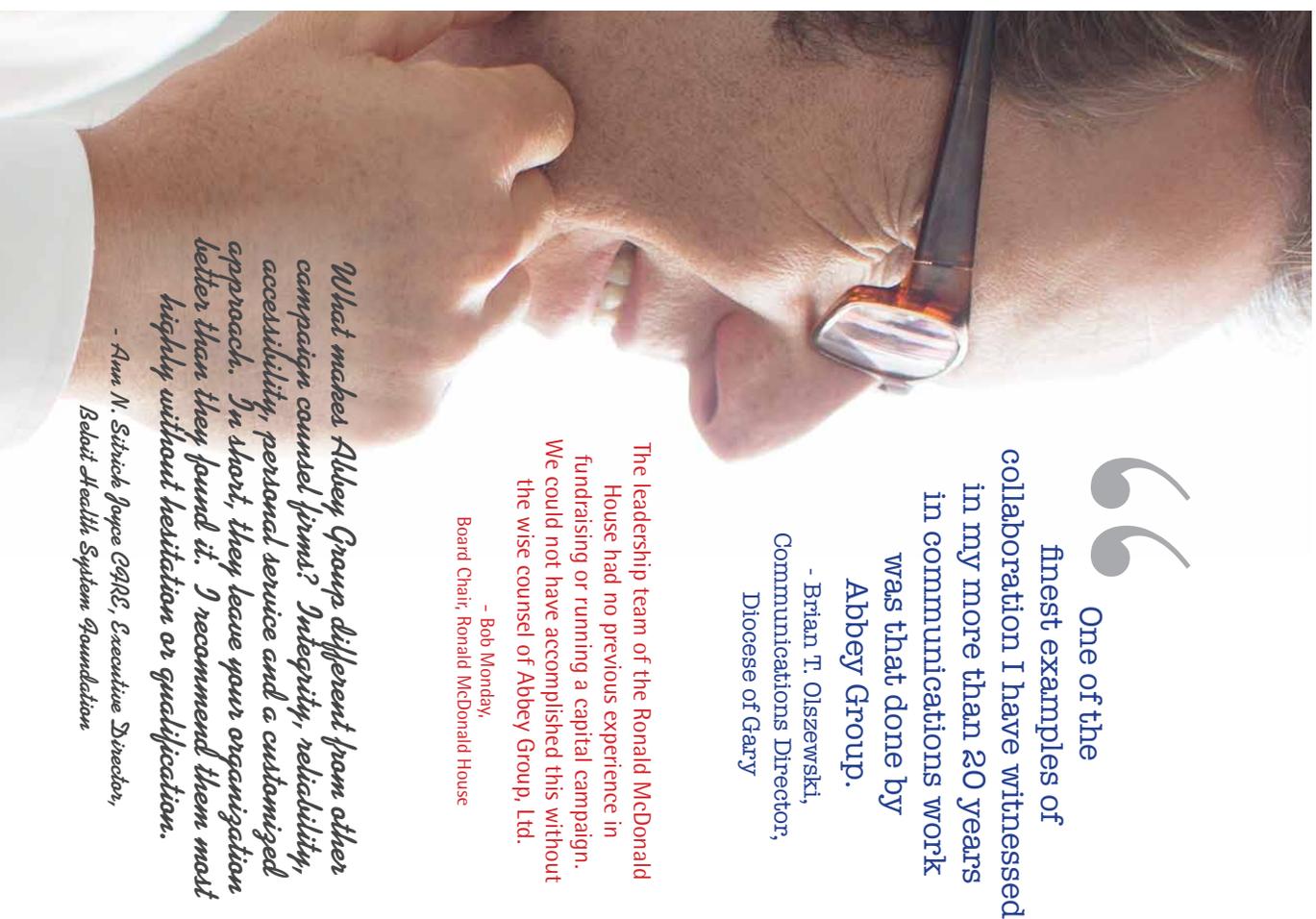
Remember that your best future donors are your current donors.

What will actually make your philanthropy sustainable?

Quite simply, three simple steps will do the trick:

1. Communicate – and don't just ask for money. Use newsletters, emails, videos, podcasts, websites, non-ask events and more to stay in touch. Stories are what donors like. Storytelling seals the deal.
2. Only connect – engage their minds, hearts and bodies in addition to their wallets. Ask them to volunteer, serve on committees, join your board. Put your donors at the center of everything you do.
3. Show them you care – ask their opinion and solicit suggestions about what you could be doing better. Form a donor mastermind group, hold a donor roundtable. They'll talk – and you'll listen, to show them you care what they think and respect their suggestions and concerns.

Sustainable Philanthropy. No end in sight.



“ One of the finest examples of collaboration I have witnessed in my more than 20 years in communications work was that done by Abbey Group.

- Brian T. Olszewski,
Communications Director,
Diocese of Gary

The leadership team of the Ronald McDonald House had no previous experience in fundraising or running a capital campaign. We could not have accomplished this without the wise counsel of Abbey Group, Ltd.

- Bob Mondry,
Board Chair, Ronald McDonald House

What makes Abbey Group different from other campaign counsel firms? Integrity, reliability, accessibility, personal service and a customized approach. In short, they leave your organization better than they found it. I recommend them most highly without hesitation or qualification.

- Ann N. Strick Joyce CARR, Executive Director,
Rebalt Health System Foundation

The Abbey Group gave us the courage and confidence to proceed with the appeal at a time when the economy was at its lowest level in years. I have no hesitation in recommending Abbey Group as a competent, ethical and professional organization with a proven track record in the field of development.

*- Margaret Simonson,
Chancellor,
Diocese of Rapid City*

The ERT would not have been successful without the direct involvement of The Abbey Group. As a member of the Academy for over thirty years I am confident in saying that the successful conclusion of our campaign was one of the greatest achievements of the American Academy of Allergy Asthma & Immunology. The Abbey Group, Ltd. would be my first choice in any campaign.

*- William J. Davis, MD,
Steering Committee Chair, AAAA&I*



INTRODUCING THE ABBEY GROUP INSTITUTE

You chose a career in philanthropy. Most likely, because you wanted to do the right thing. The good thing.

Because doing the right thing just sounds so good.

Unfortunately, good just isn't good enough anymore. Instead, think about doing the great thing.

Do the thing that turns everything in philanthropy upside down - and reshapes it forever.

Let the Abbey Group Institute show you how.



The Abbey Group Institute grew from years of experience and presentations to clients and nonprofits. The Institute provides the opportunity to experience the difference between good and great fundraising. And it will give you the opportunity to experience excellence.

_____ **WITH TOPICS THAT WILL COVER** _____

- Fundraising 101, or Starting at the Beginning Again
 - Generational Giving
 - Sustainable Philanthropy
 - Major Gifts – The Big Finish
- Donor Centered Philanthropy – Because the Cause Comes First
 - Getting the Board on Board
- Details, Details: Governance, By-laws, Process
 - Who's Next: Succession Planning
- All in the Family: Marketing to a Family Business
 - Demystifying Direct Mail
 - Baby Boomers – Today's Major Donors
 - Millennials – Tomorrow's Major Donors

And finally, if 90% of the money is given by 10% of the people, how do you market to the 8% that doesn't include Bill Gates, Warren Buffet, and Google?



_____ **OPTIONS FOR CLIENTS** _____

- One-day Seminar:**
 - 9 – 12: two sessions, break / 12 – 1: lunch break / 1 – 4: two session, close
- Two-day Retreat:**
 - First Evening: Social Session / Dinner – keynote
- First Day:**
 - 9 – 12: two sessions, break / 12 – 1: lunch break / 1 – 4: two sessions, close / Social Session/Dinner – keynote
- Second Day:**
 - 9 – 12: two sessions, break / 12 – 1: lunch break / 1 – 4: two sessions, close

You can do this. You have it in you.
To do the right thing or not, is a choice.

So why not choose to do the great thing?



STRATEGIC CONSULTANTS FOR CHARITABLE GIVING

You don't have to be a Rockefeller or a Ford or a Carnegie to set up a charitable foundation.

Or to re-organize the charitable foundation you've already set up.

If the task seems daunting, think about this: Consider Abbey Group to help you define your mission and hone your charitable focus.

Consider Abbey Group to help you give away your money responsibly.

We'll help you shape the level of involvement you want to have and the community awareness you desire. All while protecting your confidentiality and privacy.



Don't forget to ASK!

With over 30 years of philanthropy experience, Abbey Group can coordinate all the financial set-up, legal filings, and policy development required, using partnerships with investment and legal advisors.

Then, once all the basics are in place, Abbey Group directors will scrutinize the funding requests your foundation receives and make our recommendations to your board for their approval. Or we'll develop and send out requests for proposals to those organizations that are the best fit.

Once it's been decided who will receive a grant, our directors develop and monitor the terms and conditions of all grants and present periodic progress reports to your board, ensuring that your gifts have the impact you intended.



Abbey Group can also take on the responsibility for handling all the foundation's correspondence, preparing press releases, annual reports, content for your website ...you name it.

HERE'S HOW WE HELP:

- Establish a new foundation
- Recalibrate your current foundation
- Mentoring
- Counsel at family or corporate foundation meetings
- Appeal/Fundraising/Philanthropy Consulting
- Family Business Philanthropy
- Development Audit
- By-laws Review

Abbey Group. Leaving you free to concentrate on what's most important:

THE GIVING.



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