EMPREINTE
CONSULTING, LLC.

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Empreinte Consulting LLC.

Nonprofit Fundraising Consultants & Philanthropic Advisory Services

EMPREINTECONSULTING.COM

What's in a name?

EMPRE

INTE CONSULTING LLC.

EMPREINTE: Pronounced **[ōm][pront]** is the French word for imprint or footprint.

At Empreinte Consulting, we're passionate about helping those who help others. Together, we'll leave a lasting impression on the world around us.

OUR MISSION
By sharing our collective expertise, we strive to empower our clients to maximize their impact from philanthropy.

OUR VISION
We will harness the power of philanthropy to affect positive change and create a better life for everyone in the communities we serve.

OUR VALUES
Expertise, Integrity, Empathy, and Humility

Welcome

We are thrilled you are considering a partnership with Empreinte Consulting.

Allow us to introduce ourselves...

Empreinte Consulting, LLC is a full-service philanthropic consulting firm that partners with nonprofit organizations, foundations, corporations, and individual philanthropists to maximize their impact on the community.

What are the things that keep you up at night? What are your pain points in achieving your short-term and long-term goals? Are you contemplating or in the middle of significant transitions, with programs or with staff? Are you looking for guidance in areas where you simply don't have the deep bench of knowledge and experience you need on your team?

As you reflect on these questions, know that we are poised and ready to help you. Backed by over 250 years of industry experience, the Empreinte team offers strategic advisory services to ensure the relationship between donors and the organizations they support are mutually beneficial—and the impact from those relationships fulfill the vision of both parties.

OUR SERVICES

Our Team

LEADERSHIP PARTNERS

Marc Misiurewicz founded Empreinte Consulting to facilitate the work that is improving or transforming the human experience. Having served as the conduit for relationships between philanthropists and the organizations that benefit from their generosity for more than 27 years, he is able to provide broad and in-depth development leadership and philanthropic counsel. His work is supported by a wealth of knowledge on the strategies and best practices associated with both fundraising and giving.

Prior to launching Empreinte, Marc spent a decade building relationships with individuals and businesses who had an interest in or ability to support the University of Rochester and Rochester Regional Health. At the University, he supported fundraising efforts for Golisano Children's Hospital and led the Del Monte Neuromedicine Institute Advancement team, as well as other programs. And at Rochester Regional, he oversaw a team of development professionals and worked closely with leadership to establish and implement a strategy for a comprehensive $300M fundraising campaign. Before he entered the world of fundraising, Marc was doing recruiting for a division of Cochran, Cochran & Yale, a professional, technical, and executive search and recruitment firm. His experience there enabled him to establish Tax Integrity, LLC, which specialized in placing tax professionals in Fortune 500 companies.

Throughout his career, Marc has always been enthusiastic about volunteering and giving back to his community. He has served on the board of Mary Cariola Children's Center, which provides education and life skill solutions to individuals with complex disabilities. For the last 15 years he has been the coach and board member within the youth soccer club Cobras FC. In his spare time, he enjoys golf, soccer, and traveling with his wife, Jeannine, and their three children.

Marc is a graduate of Keuka College, where he earned a B.S. in Human Resource Management, and a minor is Psychology.

Carrie Piraino has thrived in development and leadership positions in the nonprofit sector for more than 10 years. Her passion for connecting donors to the causes they care about drives everything she does. She is as enthusiastic about tailoring her approach to your philanthropic goals – whether you are a nonprofit or corporation, an aspiring philanthropist or a group of benefactors with a shared interest, or something in between. Carrie is continually building her knowledge base by staying informed on trends and emerging ideas, which she passes on to clients. Her goal is to help shape the next generation of philanthropy in this region – and beyond – to foster a more global culture of giving.

Carrie's background in leadership development positions at the University of Rochester and Rochester Regional Health have given her the experience and skills to engage donors and maximize philanthropic revenue. Her expertise includes relationship building, donor and volunteer management, organizational efficacy and optimization, and goal setting. She has used this to contribute to success in comprehensive fundraising campaigns. Most recently, Carrie led fundraising initiatives for multiple hospitals and services lines including Nursing across a $2.5B health system. She developed key aspects of a $300M comprehensive campaign. Carrie prides herself on providing strategic direction in creation of a leadership annual giving society, which yielded $1.8M in the first year. She has a proven record of recruiting and engaging volunteers to function as campaign ambassadors within a formal campaign cabinet structure. In her time as a Major Gift Officer, Carrie independently raised over $2M annually to address priority initiatives for comprehensive fundraising campaigns.

Carrie is a Rochester native, currently living in Pittsford with her two children. She is committed to strengthening our community through volunteerism and personally advocates for children's health and education. In her spare time, she enjoys fitness activities, golf and cooking. She graduated at the top of her class at the University of Delaware, where she earned a B.S. in apparel design and merchandising.

CONSULTING EXPERTS

Jen Adams
Grant Writing
& Research

Lauren Apt
Data & Prospect
Management

Pam Ayers
Sr. Consultant,
Grants Management

Nan Burgess-Whitman
Market Research

Tree Clemonds
Grant Writing
& Research

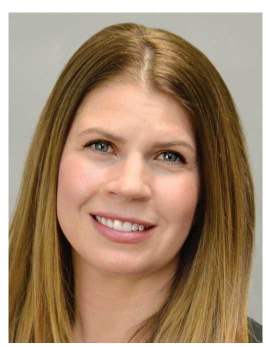
Carol DeMoulin
Sr. Philanthropic Advisor

Anne Komenecky
Board Consultant

Paul Spengler, Ph.D.
Grant Writing
& Research

Bob Stamp
Sr. Consultant, Florida

Betsy Steehler
Annual Giving & Direct
Marketing Consultant



Deborah Trimble
Fundraising Consultant

Pamela White
Sr. Fundraising Consultant

Over 250 years of combined experience.

Nonprofit Leadership
& Organizational Management

How we can help

Whether your organization is going through a major transition, you need help training a new member of your development team, or you're looking for advice on managing the expectations of your board, Empreinte has you covered.

We offer initial assessment, as well as short-term or long-term consultation services for the following:

- Building trust with leaders, board members and stakeholders
- Defining organizational structure and responsibilities
- Developing cross-functional partnerships
- Managing teams in times of transition or turmoil
- Peer benchmarking
- Professional development
- Setting performance metrics
- Staff recruitment and training
- Strategic planning, goal setting and budgeting

"The leader is one who, out of the clutter, brings simplicity... out of discord, harmony... and out of difficult, opportunity."

-ALBERT EINSTEIN

Board & Volunteer
Management

ORGANIZATIONAL ADVOCATES

Your volunteers are an extension of you and your team, and they can help you expedite your development operations and achieve your objectives. A well-managed volunteer program is worth investing in because the ROI can be significant.

Let us help you align and ignite the passion in your allies and advocates through consulting, assessments, and sessions on:

- Building a volunteer plan
- Creating training and collateral materials
- Defining roles and responsibilities
- Engagement strategies
- Managing difficult or disengaged board members and volunteers
- Recruitment and retention strategies
- Reporting development activities to your board
- Setting clear expectations
- Solicitation strategies for board members and volunteers
- Stewarding your board/volunteers
- Tapping into volunteer networks
- Tracking volunteer activities
- Using surveys to measure satisfaction, etc.

IS YOUR BOARD DISENGAGED?

These are some of the most common signs we see that indicate a board or board member is no longer engaged:

- **Delay in completing tasks**
- **No longer generating ideas**
- **Lack of preparation**
- **Passive in the boardroom**
- **Poor communi-cation**
- **Fundraising roadblocks**
- **Lack of promotional efforts**
- **Absent at events**

Annual Giving
Programs

We offer initial assessment, consultation, and/or educational sessions for the following:

- A/B Testing
- Acquisition, reactivation, upgrade, and retention strategies
- Annual planning, goal setting and budgeting
- Audience selection, segmentation and tracking
- Brochures, signage, ads and other print solicitation pieces
- Copywriting
- Demonstrating donor impact
- Direct mail and email solicitation best practices
- Direct marketing planning, implementation, and analysis
- Employee campaigns
- Giving circles and recognition societies: mid-level, loyalty, etc.
- Graphic design and printing services (outsourced)
- Grateful patient programs
- Mailing list preparation
- Micro-campaigns: GivingTuesday, year-end, etc.
- Monthly sustainer programs
- Multi-channel fundraising
- Scaling your program to maximize ROI
- Stewardship and cultivation tactics
- Using personas to target your constituents
- Vendor sourcing and coordination

Building a Solid Foundation

Annual Giving is the foundation of any organization's fundraising success; that's why it's at the bottom of the giving pyramid! Soliciting the masses doesn't have to be a massive pain. Our team can handle every aspect of your program, help you optimize one small component, or anything in between.

"Empreinte helped us create a high quality direct mail campaign that exceeded our expectations, and we intend to continue working with them on future projects."

-Mike Hoskins
Paramedic, BS, MPO
Chief, Perinton Ambulance

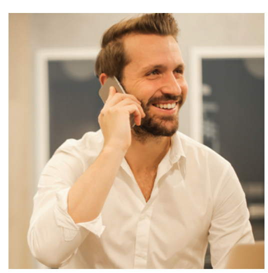
Stewardship
& Donor Engagement

Enhancing the donor experience

Donors who feel appreciated and engaged with your organization are significantly more likely to become lifetime donors. There are countless ways to engage your donors, but which ones make sense for your organization's budget, staffing, and resources? Are you properly stewarding your donors at every level? How are you going to plan your next gala with your event coordinator out on maternity leave?

Let our team of experts help guide you along the way with:

- Annual planning, goal setting and budgeting
- Branded thank-you gifts
- Building a stewardship matrix
- Consecutive donor stewardship tactics
- Copywriting for social media
- Demonstrating donor impact
- Digital engagement strategies
- Employee engagement strategies
- Events: planning, collateral, communications, tracking, etc.
- Membership and giving society benefits
- Naming opportunities, donor walls, paver programs, etc.
- New donor stewardship tactics
- Newsletters and annual/impact reports
- Peer-to-peer fundraising
- Personalized stewardship reports
- Promoting recognition societies
- Survey creation and execution
- Writing /editing donor acknowledgments





Development
& Major Gift Fundraising

Cultivating relationships

Being a development officer is so much more than taking donors to lunch and asking them for money. It's about building meaningful relationships, being attentive and intuitive, cultivating and stewarding, and understanding your donors' passions/values and aligning them to your organization's needs. Whether you need help building a comprehensive major gift strategy for your next campaign, recruiting a new director of development, or simply drafting a proposal, our expert advisors are here to help!

We offer full program assessment or customized consulting services for the following:

- Building trust with donors and stakeholders
- Cultivation, stewardship and engagement tactics
- Demonstrating donor impact
- Developing a major gift strategy
- Donor qualification / cold calling
- Drafting a proposal or gift agreement
- Getting referrals from internal leaders, board members and volunteers
- Learning what motivates your donor
- Making the "three-part ask"
- Managing your portfolio
- Preparing for your call or visit
- Prospect tracking (contact reports, actions, proposals, etc.)
- Recruiting and training gift officers
- Storytelling to ignite action
- Tapping into your donor's network
- Tips for securing visits
- Understanding your organization's vision and funding priorities
- Your "top 10" prospects
- Your donor declined. Now what?

"As our relationship with Empreinte has evolved, we have found their comprehensive fundraising services and community knowledge to be incredibly valuable. Their expertise and strategic direction have brought tangible results which speaks to the strength of our working relationship." -Loren J. Ranaletta, President & CEO of Episcopal SeniorLife Communities

Prospect Research
& Portfolio Management

Identifying opportunities

Many organizations do not have the staffing or resources to focus on these areas, but they're essential to the success of your development officers. Our experts can provide the leads and background information you need to effectively qualify and engage your prospects. We can also ensure your portfolio has the right quantity and mix of prospects to produce visits and, ultimately, significant gifts for your organization.

We offer full assessment, consultation, and/or educational sessions for the following:

- Assigning solicitors
- Building portfolios to meet gift officer metrics
- Conducting portfolio review meetings
- Data-driven prospect identification
- Does your portfolio have the right "mix" of prospects?
- How to ensure a seamless prospect hand-off
- Identifying your "top 10" prospects
- Prospect bio summaries
- Prospect classification
- Prospect research tools/software
- Reporting for portfolio review/management
- Setting up Google Alerts on your devices
- Wealth screening

Data Management
& Reporting

Measuring Success

The effectiveness of your development operations depends largely on your database hygiene and ability to extract information to examine giving trends, identify potential prospects, and better understand your donor population to inform future fundraising strategies. Utilizing your CRM to track constituencies, appeals, events, audience segments, contact reports, and more will ultimately enable you to raise more money for your organization.

"Data are just summaries of thousands of stories—tell a few of those stories to help make the data meaningful."

-Dan Heath
Bestselling Author

We offer full database assessment, consultation, and/or educational sessions for the following:

- Address, email, phone, and employer research
- Appeal tracking
- Biographic data clean-up
- Categorizing and coding your constituents
- Database integrations
- Deceased screening
- De-duplication of records
- Establishing standards for assigning addressees and salutations
- Event tracking and reporting
- Importing your contacts into a CRM
- Mailing and email list preparation
- NCOA move updates
- Prospect tracking: solicitors, classification, status, contact reports, actions, notes, etc.
- Using reports and dashboards in your CRM
- Using solicit codes for special handling

Gift Processing
& Fund Administration

Compliance and Trust

One thing donors often say is important to them in choosing which organizations to support is trust. They tend to support nonprofits they trust to use their donation responsibly, and for its intended purpose to make a positive impact. Sloppy gift entry and poor fund administration can have serious implications for your donor retention and even negatively impact internal stakeholders' perception of your advancement department. Our team can help you establish structure and SOPs to ensure these processes run smoothly.

Our team excels at helping you assess, create, and impliment the tools needed to make gift processing and fund administration less stressful through:

- Creating new donor records
- Daily gift log
- Developing a gift acceptance policy
- Donation form creation
- Donor acknowledgments: automation and documentation
- Donor advised funds
- Endowed funds: setup and reporting
- Establishing checks and balances
- Financial reports and reconciliation
- Fund clean-up and standardization
- Gift back-up and reconciliation
- Gift entry training and SOPs
- Gift modifications, fund transfers and audit reports
- Hard credit vs. soft credit
- Merging, deactivating and repurposing funds
- Partnering with finance and fund administrators
- Reviewing "unsolicited" gifts
- Setting up new funds
- Understanding GL distributions

Corporate & Foundation
Relations

Pivotal Partnerships

Your corporate and foundation partners can be some of your biggest allies, but managing their long-term relationship with your organization can be challenging. As donors, they tend to be more transactional than individuals. Our advisors will show you how to leverage this behavior, as well as guide you in building partnerships that are mutually beneficial and impactful.

We offer full program assessment or customized consulting services for the following:

- Aligning organizational priorities with corporate interests and values
- Annual planning and goal setting
- Corporate match challenges
- Developing a gift acceptance policy
- Event sponsorship and recognition
- Marketing materials and web presence
- Navigating changes in corporate leadership, public image, and other factors
- Prospect tracking and gift documentation
- Retention and upgrade strategies
- Stewardship and cultivation tactics
- Utilizing peer-to-peer fundraising to boost employee engagement
- Workplace giving campaigns

Grant Writing
& Research

A WINNING APPROACH

Grant writing has the highest ROI of any development function, yet many nonprofits neglect this work. It may be due to staff shortages, attention being diverted to other projects, or simply being unfamiliar with the grants process. Our seasoned experts can guide you through any or every phase of the grant life cycle.

We offer consultation services for the following:

- Asking the right questions when contacting a grantor
- Building a plan and timeline
- Determining which grants to apply for
- Grant writing best practices
- Grants management: administration, accounting, compliance and reporting
- Identifying your organization's funding needs
- Proposal development: setting goals, objectives, activities and budget
- Recruiting and training your grant writer/manager
- The grant life cycle: pre- and post-award activities
- Understanding different types of grants

OUR IMPRINT: GRANTS BY THE NUMBER

$12M+
in total grants awarded since 2020

74.5%
of all grants applied for are received

Over 60%
of grants received were new funding sources for our clients

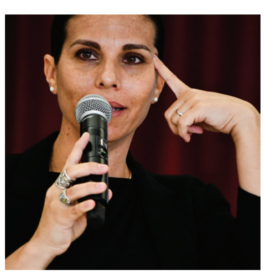
Capital & Comprehensive
Campaigns

Transforming your organization's future

Case statements, cabinets, and capital projects – oh, my! Let us take the guess work out of planning and implementing your next campaign. Our seasoned experts can guide you through every phase of your campaign or assist you with one or more specific task.

Our expert consultants are here to help you every step of the way with:

- Conducting a feasibility study
- Creating case statements
- Defining capital and programmatic funding priorities
- Developing your campaign structure, gift table, budget and timeline
- Event planning and execution
- Generating public awareness
- Identifying lead and major gift prospects
- Incorporating peer-to-peer fundraising
- Marketing materials, web presence, branding and messaging
- Metrics and reporting
- Naming opportunities
- Pipeline development
- Securing a challenge grant
- Setting up advisory committees, cabinets and volunteer groups
- Stewardship and cultivation tactics
- Strategic planning and goal setting

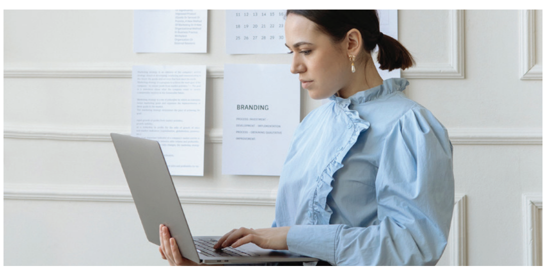

Market Research
& Qualitative Analytics

Cracking the Code to Your Constituents

You might think you know your audience well, but do you really? One of the best ways to answer this question is through qualitative market research performed by an industry expert. Our dedicated market specialist can provide insights to better understand and target your constituents, ultimately leading to increased donor participation, retention, and overall satisfaction.

We offer the following services:

- Compiling sample data
- Identifying and defining audience personas
- Online focus groups via “Bulletin Board”
- Screening for group participants
- Summary of findings with or without recommendations
- Survey creation and implementation
- Tailored questioning of participants



Instead of relying solely on demographics to target your audience, start appealing to their interests.

Planned Giving
& Philanthropic Advisory Services

Planned Giving

Being proactive and developing a plan for communicating with your donors about planned giving can yield transformational returns for your nonprofit. By implementing a few best practices, your constituents will feel well-informed about the ways they can make a lasting impact, and therefore, more open to having conversations with you about planning their legacy.

Our experts can advise you in any of the following areas:

- Annual planning, goal setting and budgeting
- Building a legacy society
- Creating planned giving marketing materials & web presence
- Hosting a planned giving informational event for donors
- Planning and executing direct marketing campaigns focused on planned giving
- Stewarding legacy donors

Philanthropic Advisory Services

There are countless organizations that could benefit from your generosity. Deciding which one(s) to support, and the best way to make a meaningful impact on those they serve, can feel overwhelming. Empreinte's experienced philanthropic advisors will help you explore causes that are closely aligned with your values, as well as the various ways you can support those causes now and in the future. Our intention is never to influence a donor's philanthropic choices; rather, we strive to help them navigate the journey in building a legacy they feel proud of.

We offer consultation services for the following:

- Coordinating with nonprofit leaders, development officers, attorneys, and financial representatives on your behalf
- Defining your core values, as well as your philanthropic goals and objectives
- Drafting or reviewing proposals, gift agreements, bequest intentions, etc.
- Ensuring any terms are fulfilled by recipient organization(s)
- Exploring funding needs and planned giving opportunities within chosen recipient organization(s)
- Finding causes that align with your philanthropic goals and objectives
- Identifying potential recognition, including naming opportunities
- Setting up a donor advised fund

Pricing Models
Because one size does not fit all

Hourly Fee
Want flexibility? Engaging with our consultants and advisors on an as-needed basis provides you and your organization the greatest flexibility. Empreinte also offers hourly educational sessions for clients interested in learning about specific topics.

Project-based
Have a complex problem or big project?
Empreinte provides a quote based on the scope of the project (including any services we expect to outsource); subsequent revised quotes are issued to the client if significant changes are made to the project specifications.

Retainer
Need long-term assistance?
Empreinte's consultants are available to help clients on an ongoing basis; this model is often useful for clients who need support across multiple programs and/or over an extended period of time.

OUR IMPRINT:

More than 75% of our clients renew their initial contract as they have realized direct benefit from the expertise provided by the team at Empreinte Consulting.

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Ready to maximize your impact?

REACH OUT TO US!

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