



**Feldsteinco LLC**

Snowballing Your Fundraising

---

# Points of Distinction

*Audaces Fortuna Iuvat*

**Creating for Clients Priceless and Visionary Platforms to Truly  
Monetize High-Net-Worth Relationships**

# Why we get unexampled results and why someone would want to spend their money with us:

1. Feldsteinco is the firm leading institutions hire when they embrace the future and want unexampled results and not more of the same. We sell big fund raising success, not unnecessary process for the sake of process. Our clients are not looking primarily for slide formatting, they are quite properly demanding analytics and recommendations
2. Our Action Logic and strategic mindset. We are 21st-century strategy consultants, specializing in fundraising — not our grandparents' typical 20th-century fundraising consultants. We get snowballing results with relentless focus on strategy, mission, branding and execution
3. Our focus on helping clients implement a true philanthropic digital business strategy
4. Our commitment and ability to help clients leverage and grow their resources to match their visions
5. Our mindset of helping clients lengthen their ambition spans and calibrate their strategic intent
6. Our mindset of “Total Ownership” and values-based collaboration and hands-on educative engagement with clients
7. Our *7-Point Scale* and understanding of why institutions succeed and commitment to the Feldsteinco principles of fundraising success
8. Our strategic capacity to think big and connect the dots
9. Our international boutique advisory firm provides the deliverables clients really need to grow and make the world an even better place
10. Our knowledge-based company helps clients develop the recognition products their donors want
11. Our intellectual capital, thought leadership, and content-based marketing know-how
12. Our purpose-driven commitment to assuring that leaders of client institutions have the intellectual capital at their command to take the actions necessary to achieve stretch goals
13. Our special capabilities as an energizer that help clients do those essential things that really count in raising much more money
14. Our sense for how events will flow and intuitive ability to recommend the right actions
15. Our *Brand Promise* that your fund raising success will exceed all expectations during our work as your advisor

*“Life is like a snowball. The important thing is finding wet snow and a really long hill.”*

**Warren Buffett**

## **One of the world’s leading boutique advisory firms, providing clients with the products they really need**

The need for our type of service is great. We work collaboratively with our clients to help them secure the resources to grow and advance human progress.

We are a niche business and serve a wide range of leading institutions in the U.S. and Europe. In contrast to our competitors, we are a boutique firm providing strategic advisory services at the highest level, focused on major challenges in fundraising. In consulting on managing fundraising, we are implementing Peter Drucker’s basic insight that “plans are only good intentions unless they immediately degenerate into hard work.” Our ethos and business model ensure that clients do not have to compromise or experience a trade-off between having a full-service fundraising advisory firm and receiving the benefits of the most experienced, direct, creative, hands-on, innovative, trustworthy, bold, confident, and focused advice.

We are able to help our clients and their trustees courageously and boldly get hold of the matters at hand, formulate their vision, develop their strategy, build their digital and other organizational capabilities, rationalize their initiatives, and solve their most pressing financial development and growth issues with intellectual and strategic courage. The right fundraising strategy properly executed is transforming.

As Benjamin Disraeli observed, “The secret of success is constancy to purpose.” We help our clients keep their eye on the main chances, re-make their fundraising world according to their aspirations, turn opportunities into realities, and make their circumstances.

*“Circumstances—what are circumstances? I make circumstances.”*

**Napoléon Bonaparte**

# A knowledge-based company helping clients get the grand strategy right

We help our clients develop the courage to do what they need to do. In the 21<sup>st</sup> century, fund-raising success belongs to the fast. We know that in raising money what counts ultimately is not just the “courage of your convictions,” but, even more fundamentally, the “convictions of your courage.”

Clients and their trustees receive the full benefits of our Action Logic, ethos, experience, reputation, research, commitment, discipline, energy, creativity, knowledge, and empathy. We are pro-active advocates and energizers for our clients.

We pride ourselves on our intellectual capital; ideas-based culture; practical wisdom; commitment to our clients; and understanding of human nature, donor psychology, and the philanthropic brain. We make certain our clients know which policies and practices will lead to raising more money. We combine highly granular focus on important information with a unique knowledge of the big picture to develop unexampled marketing ideas.

One of our most valuable assets is our ability to help clients find the right series of ideas and moves to grow and propel themselves forward in raising big money. Our focus on the right processes is grounded in our understanding that fundraising is a chemical process, not a mechanical one.

Our type of service is extremely cost-effective. Just one of the major gifts a client receives because of our advice, or one significantly bigger than it would have been otherwise, more than covers the fee for our entire engagement.

*“Success is based on a few simple things. The challenge is that you have to do them.”*

Marvin Bower

# **An intellectual capital, research, and content-based fundraising company**

The unconstrained flow of ideas is essential for growth.

We are unmitigated in our advice and tell clients things we know that others do not. And we make certain they are the things they need to know. We assume clients “want to hear what they do not want to hear.” We also recognize that it can be as important at times to advise clients on what not to do as well as what to do. As a content-based organization, Feldsteinco helps its clients strategically connect the dots and exceed their fundraising goals.

We have helped many clients build high-end donor networks through the associational marketing approach we have developed. “Join our club” can be among the most persuasive words in philanthropy.

*“The key to future competitive advantage will be the organization’s capacity to create the social architecture capable of generating intellectual capital. And leadership is the key to realizing the full potential of intellectual capital.”*

Warren Bennis

# A collaborator and innovator in partnership with our clients

As a unique advisory firm, we help our clients align their financial resources with their strategic plans and aspirations by establishing and achieving clear, ambitious, and actionable financial development targets. As Pareto observed, “20% of invested input is responsible for 80% of the results obtained.” Our value added is based on a major comparative advantage centered around our Action Logic, digital business strategy, commitment to achieve stretch goals, strategic insights and capabilities, focus on implementation and marketing approach to fundraising.

Our vast experience applies to virtually any challenge affecting large gift fundraising.

## Core Competencies:

- Capital campaigns and grand strategy
- Building projects
- Endowment growth through new gifts
- Thinking and acting digitally
- Monetization platforms
- Digital transformations
- Growing donor Networks
- Programmatic growth
- Leadership Action Logics
- Success visualization and *dynamic feasibility goal setting*
- Financial analysis
- *Philanthrostats* customized fundraising metrics
- Expanding Mission consciousness and portrayal
- One-to-one specific solicitation strategies
- Staff development/mentoring
- Development/campaign budgeting
- Institutional culture transformations
- Board development
- Governance
- Thinking as leaders think
- Fundraising processes
- Strategic planning-based fundraising
- Institutional branding and positioning
- Donor engagement processes
- Donor loyalty: we help you develop donors who are your happy promoters
- Donor recognition products
- “Associational Marketing”
- Major paradigm shifts
- Content Marketing
- Prospective contributor research
- Private/public partnerships
- Public relations strategies
- Issues constraining the fundraising process
- Constituent engagement through Internet strategies
- Strategic communications and marketing presentations
- Database marketing/relationship building
- Creation of new donor networks
- Energizing fundraising thinking and action
- Leadership/team building and collaboration
- Operational efficiencies and staff organization
- Benchmarking/metrics
- Trend leveraging/issues research
- Intellectual public relations

*“All Life Is Problem Solving”* - Karl Popper

## The historic examples of Millennium Park and the Art Institute's Modern Wing - together, projects approaching \$1 billion in magnitude



*Millennium Park with Cloudgate (foreground) and the Jay Pritzker Pavilion*

James Feldstein is proud to have served as advisor to Millennium Park, Inc., and Music and Dance Theater Chicago: The Joan W. and Irving B. Harris Theater for Music and Dance. These related campaigns together raised \$238 million in private-sector support in a \$500 million public/private partnership.

*“Seize any opportunity, or anything that looks like opportunity. They are rare, much rarer than you think. Remember that positive Black Swans have a necessary first step: you need to be exposed to them.”*

Nassim Nicholas Taleb



*Millennium Park Peristyle*

Millennium Park sought gifts of \$1 million and above. Ultimately, 115 Founders, each most generously giving between \$1 million and \$15 million, “joined the club” and contributed a total of \$175 million for Chicago’s “Project of the Century.”

Music and Dance Theater Chicago—the Joan W. and Irving B. Harris Theater for Music and Dance—raised \$63 million in a separate campaign to build its 1,500-seat theater in Millennium Park.

*“Whenever you see a successful business, someone has made a courageous decision.”*

Peter Drucker

*“Some people see things as they are and say why. I dream things that never were and say why not.”*

George Bernard Shaw



*Modern Wing and Nichols Bridgeway connecting Millennium Park with the Art Institute of Chicago*

The Building of the Century Campaign raised more than \$400 million for the Art Institute of Chicago's Modern Wing by Renzo Piano, the new building's operating endowment, and related gallery reinstatement projects throughout the museum.

*“To aspire to any kind of leadership in business you simply have to be a rational optimist.”*

Donald R. Keough

**Have you embraced the new style of fundraising?**

**Are you moving ahead boldly and courageously and putting  
first things first?**

**Are you satisfied with your growth?**

**Are you thinking and acting digitally?**

**If not, we will collaborate with you.**



**Feldsteinco LLC**

The Wrigley Building, 400 North Michigan Avenue, Suite 1650, Chicago, IL 60611  
Phone: 312.600.9960 Email: JamesF@Feldsteinco.com Website: [www.Feldsteinco.com](http://www.Feldsteinco.com)