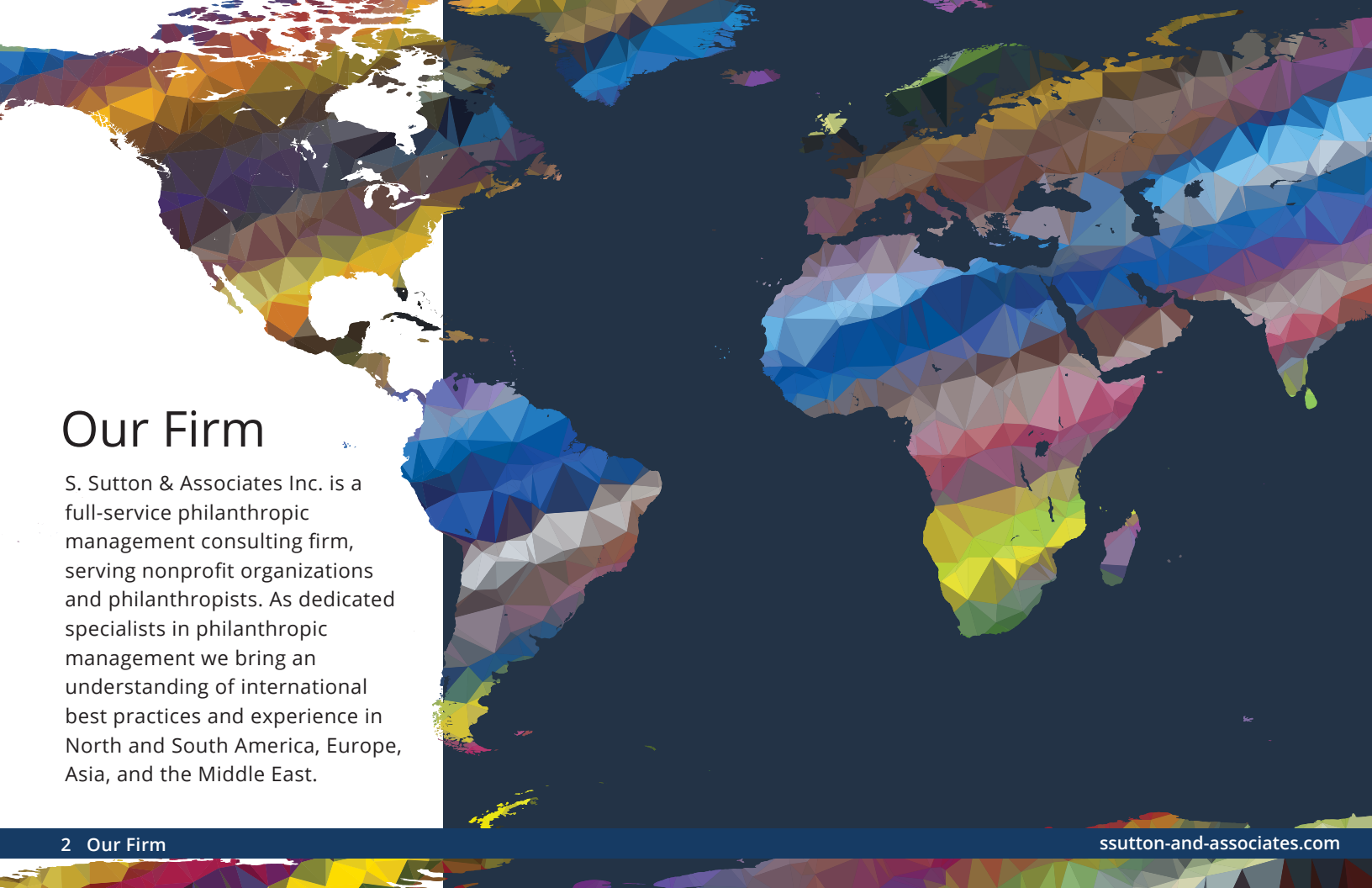




# S. Sutton & Associates Inc.

Consultants in Philanthropic Management

S. Sutton & Associates Inc. brings decades of experience to all aspects of your philanthropic initiatives, providing the best possible strategies and approaches to help you realize your philanthropic potential.



## Our Firm

S. Sutton & Associates Inc. is a full-service philanthropic management consulting firm, serving nonprofit organizations and philanthropists. As dedicated specialists in philanthropic management we bring an understanding of international best practices and experience in North and South America, Europe, Asia, and the Middle East.

# Your Philanthropic Footprint

The philanthropic marketplace is complex and competitive. As philanthropists demand increased productivity and accountability from the organizations they support, well-researched strategic planning and execution of philanthropic initiatives becomes increasingly important. Our mission is to render nonprofit organizations, and philanthropists, fit for high performance, aligning philanthropic initiatives with strategic direction. S. Sutton & Associates Inc. assists in developing and implementing best practices to facilitate sustainable philanthropic success.



# Our Innovation Team Model

S. Sutton & Associates Inc. differentiates itself from other consulting firms in that the client is not charged for services and expertise that are beyond the scope articulated by the client, or unwarranted, given the charge. This is accomplished through customized "*Innovation Teams*" of highly skilled technical experts with the personal attributes and expertise in their respective disciplines, *assembled to meet the client's unique needs*.



## Listen & Understand

We take as much time as needed upfront to listen, understand and evaluate your unique challenges, needs and opportunities.



## Assemble the Right Team

Our Innovation Team model is based on your unique needs. We only assemble the ***right team, for the right amount of time*** so that you get the ***right solutions***.



## Local Perspective, Global Knowledge

Each Innovation Team is a blend of local expertise from your city, state or province and global experts with deep experience in your areas of need.



## Your Unique Roadmap

We are committed to delivering you a strategic roadmap that is easy to understand, actionable, tactical and most importantly – unique to your needs.

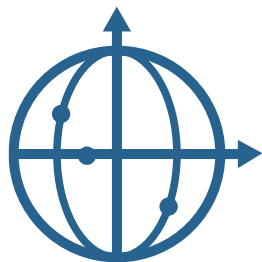


## From Start to Finish

Our belief is that there are far too many 'solutions' that end up overwhelming rather than helping. We get it. That's why we are with you as long as you need us.

We get it... the word "consulting" or "firm" often conjures an allergic reaction for anyone that has experienced the overwhelming feeling when the 'final report' hits their desk. Trust us - all of our Associates have been there.

At the risk of creating yet another "product" or proprietary offering that promises to be unique, transformative, etc., we set out to create something...useful! A model that provides quick, cost-effective and tailored solutions to your unique needs and challenges. This isn't about providing a huge, daunting, costly package full of bells and whistles you'll never be able to use. This is about real, actionable, tactical things you can do now or in the near future. After all... you aren't looking to solve problems that don't exist, are you? You need a clear roadmap and the right team of experts. Let us be your guides.



## Core Values

- Maximize philanthropy to achieve significant impact
- Embrace and drive transformational change
- Build relationships through communication and respect
- Apply creativity to support excellence

## Collaboration

S. Sutton & Associates Inc. serves as partner with our clients to build philanthropic capacity. Our Associates bring experience, objectivity and candor in our counsel to presidents, governing boards, fundraising staff and philanthropists to help meet their objectives and build a high-performance culture of philanthropy.

## Best Practices

S. Sutton & Associates Inc. brings expertise in the most current best practices to all our relationships to help clients elevate performance to meet immediate needs and achieve long-term sustainable growth. We draw from our philanthropic management experience across diverse sectors around the world and regularly refine and apply best practices.

## Evidence-Based

S. Sutton & Associates Inc. applies a strategic, rigorous, analytics and evidence-based approach to provide guidance to the philanthropic enterprise in its entirety: all programs, support services, as well as executive and volunteer leadership.

## Rigor

S. Sutton & Associates Inc. applies rigor and seeks clients eager to set ambitious goals and align activity to achieve results.

## Results

S. Sutton & Associates Inc. is dedicated to providing counsel that has qualitative and quantitative positive impact on clients. Our accountability is to help clients achieve their philanthropic objectives and develop the means to build on success for many years to come.



# Sectors

## Arts & Culture

Visual and applied arts and design, performing arts, such as theater, opera, dance, music and festivals, cultural settings such as archives and libraries, museums, historical sites and natural heritage sites such as parks and reserves, zoos, aquaria and botanical gardens, require careful engagement and development of constituents, members and donors to maximize philanthropic support. S. Sutton and Associates Inc. is an appreciative and adept consultant to this sector and their donors, understanding the contribution of art, design and culture to the milieu of society.

## Education

Educational institutions have experienced a decline in public funding, increasing reliance on private philanthropic support. Private and public institutions alike compete fiercely for philanthropic dollars to meet operating costs and address student needs. To successfully adapt to an increasingly challenging fiscal environment S. Sutton & Associates Inc. brings expertise to this sector and to donors to design high performance programs and a sustainable future.

## Community Based Membership & Advocacy

This sector is vast and includes organizations focused on the environment, social services, sports, advocacy, civic and public affairs, as well as a wide range of charities, associations, membership organizations and faith-based institutions. All depend on private philanthropy. S. Sutton & Associates Inc. brings expertise to this sector and to donors in their pursuit of community support and impact.



# Sectors

## Healthcare

Unique, particularly complex, and more important than ever; lives are saved and enriched every day through the healthcare sector. Costs to discover, develop, translate and deliver new cures, treatments, technologies and models of care to the patient continue to soar. Declining reimbursements, healthcare reform, privacy regulations, demographic shifts, and perceptions of commercialization impact philanthropic needs and giving patterns. S. Sutton and Associates Inc. brings insight, sensitivity and highly skilled technical expertise to this sector and to domestic and international prospects and donors.

## International Development

The poor are hungry and their hunger traps them in poverty. Nearly half the world's populations, more than 3 billion people, live on less than \$2.50 per day. More than 1.3 billion live in extreme poverty, on less than \$1.25 per day. This includes 1 billion children worldwide, and each day 22,000 die due to poverty. Civil society, government, private sector and academic multi-stakeholder partnerships work to address systemic issues to eradicate poverty in all its forms and dimensions, including extreme poverty. S. Sutton & Associates Inc. understands the need to think globally and act locally. We have the knowledge and expertise to support the international development sector in raising funds to respond to this growing emergency.

# Overview of Services

## Advancement Services

Advancement Services are the functional areas within an organization that support fundraising on every level. The success of frontline fundraisers becomes one element in an overall system of support that develops and sustains relationships with donors. Effective prospect research, management and tracking, gift processing, counting, receipting and acknowledgement, revenue tracking and reporting and donor stewardship are critical not only to the success of the fundraising enterprise, but also to the overall profile and reputation of the institution.

## Alumni Relations and Giving

Many potential markets for philanthropic support of educational institutions exist, but working out in concentric circles, alumni represent the largest cohort of those with affiliation. Alumni represent the past and the future of an institution and if properly engaged can add immeasurably to the creation of a pipeline of support. Full understanding of the current and future capabilities of Alumni Relations can make the difference between an average advancement program and a strong, sustainable one, and specific strategies are required to harness the potential and unique characteristics. S. Sutton and Associates Inc. can provide the best possible thinking, strategies, approaches for each client's specific situation.



## Direct Marketing

A successful direct marketing effort is critical to the long-term health of any fundraising operation. S. Sutton & Associates Inc. can partner with you to create a roadmap for success to build strong annual giving and midlevel giving programs. Our holistic approach enables direct marketing to increase engagement and growth in major and planned gifts as well.





## Board Training, Management and Governance

Proper Board management and governance is essential for any nonprofit to assure the demands of steering, supporting and safeguarding organizations are met. Specific technical expertise is required to assure the structure and composition of the Board are suitable, meetings and communications are managed appropriately and members understand and are equipped to fulfill their responsibilities.

S. Sutton & Associates Inc. has the technical expertise to assist with each of these areas and can help ensure your Board functions as intended and in the best interest of your organization.

## Corporate Social Responsibility

The world is facing political, social, environmental and technological transformations that will have profound implications for business. Corporate Social Responsibility (CSR) brings the corporate arena profit from purpose through partnership with the nonprofit sector.

S. Sutton & Associates Inc. helps business leaders and nonprofit organizations navigate these changes, build resilience and capitalize from the opportunities these transformations may bring.



## Counsel and Support for Philanthropists

At the core of our relationships with our clients is a shared commitment to maximize philanthropic investment to achieve significant impact. S. Sutton & Associates Inc. works with clients to understand their charitable inclinations, articulate their motivations, further define their objectives, and develop and implement sound strategies that create measurable value and achieve results.

We provide deep expertise to optimally structure, establish and manage the philanthropic activities of our clients along their entire philanthropic journey.



## Data Analytics

Data is the modern-day equivalent of an Oracle or Holy Grail. Once harnessed, interpreted and applied it serves as an invaluable tool to drive growth and success. Our Associates' with technical expertise in data analytics can help your institution achieve higher, more sustainable fundraising.

## Development Program Review and Expansion Strategies

The competitive environment for philanthropic dollars increases expectations for performance and forces regular re-examination of the entire fundraising enterprise. S. Sutton & Associates Inc. Innovation Team can work with you to assess the overall effectiveness of your program and opportunities for expansion.



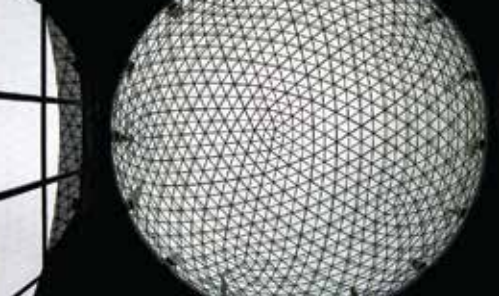
## Donor and Constituent Engagement

What you say, how you say it, when you say it and the means to convey the message require careful orchestration and integration within an organization. Our Associates are adept in all aspects of marketing and communications related to organizational profile, development, and constituent engagement.

## Fundraising Campaigns and Strategic Planning

Fundraising campaigns are a powerful driver to address institutional needs, enlist and engage the support of constituencies and elevate philanthropic performance. The process to plan and prepare for a campaign is as important as its execution, and can inform short and long term success. Our Associates can assist your organization with all facets of strategic planning, preparation, and execution as well as pre, and post-campaign assessment.





## Interim Program Management

During a time of transition, S. Sutton & Associates Inc. Associates will work on site providing day-to-day management and oversight of your advancement program.

## International Fundraising

Thomas L. Friedman's transformative tome, *The World is Flat*, gave voice to a phenomenon that "the global competitive playing field was being leveled. The world was being flattened". His words are even truer today than when written in 2005. With steady globalization in the private sector there has been increased globalization in the nonprofit sector. S. Sutton and Associates Inc. has the experience and expertise to help you engage globally.



## Major and Principal Gifts

Major and principal gifts represent an essential method of fundraising for institutions which have developed a cohort of donors who have been solicited and stewarded on a regular basis, albeit at lower levels. Though not exclusively, the vast majority of large gifts to an institution come from individuals already in its donor database. To be successful generating major and principal gifts a constellation of relationships must be built over time between a prospect or donor, the institution, volunteer leaders, subject experts and the gift officer who acts as the facilitator. All interactions are designed to engage, elicit and share information and create understanding of the impact of a potential commitment.



## Planned and Legacy Gifts

Planned and legacy gifts often represent the largest gift of an individual's lifetime and may be through gifts of appreciated assets such as stocks, bonds, real estate and other non-liquid assets or by will or bequest. An important component of any evolving development program seeking to create a pipeline of support at every level is a robust and sophisticated approach to encouraging planned and legacy gifts.

## Project Management

More than \$12 trillion (one-fifth of the world's GDP) is spent on projects, and it is not surprising that organizations aim to improve performance, reduce risk, save money, and earn a greater return on investments through excellence in basic project management execution. Rigorous management principles and processes apply to businesses in various fields and industries as well as the nonprofit sectors and philanthropic management.

S. Sutton & Associates Inc. can apply tools, processes and knowledge so your projects achieve the objective, whether you are restructuring an organization or program, conducting an event or managing multiple projects.



## Risk Management and Fundraising Governance

As donors increasingly demand tangible assurance their money is well spent and regulators question the costs of fundraising, nonprofit executives and their boards need to know how to build trust in their organization. We bring knowledge of "best practices" in fundraising and are fully conversant with standards that exist to assess them. We can work with you to understand risks associated with various fundraising approaches. We can train your staff on effective processes and we can develop tools for your Board to gain maintain confidence that your organization's reputation is in good hands.

## Our Associates: Susan Sutton, *Principal*



Aleksandar Antonijevic Photography  
[www.aleksandarantonijevic.ca](http://www.aleksandarantonijevic.ca)

SUSAN SUTTON is a seasoned C-Suite nonprofit executive with a proven track record of institutional advancement, developing and implementing fundraising campaigns and business operations to achieve multi-billion revenue goals from domestic and international clientele.

Over the course of her professional career Susan has demonstrated innovative and dynamic leadership, strategic vision and operational management expertise in a variety of settings from small grassroots to large complex, public and private, academic, research and patient care institutions as well as national advocacy and membership organizations, with domestic and international audiences. More than half of her career was spent with three iconic institutions, the National Jewish Center for Immunology and Respiratory Medicine (now National Jewish Health), Penn State University and Johns Hopkins University, each recognized internationally for their areas of expertise, as well as best practices in institutional advancement.

Most relevant to the consulting space is her experience serving in a leadership capacity, building and implementing robust, sustainable and seamless continuums of development and alumni relations activity through direct marketing, annual fund, foundation and corporate, major, principal and planned gifts programs, and planning, developing and implementing organizational structure and all operational matters for a range of campaigns, the largest and most significant the \$2B campaign for Johns Hopkins Medicine.

Susan has proven to be adept at developing fully integrated business plans and cases for support, establishing goals and high performance metrics, managing human resources, communications, government relations, stewardship and advancement services, including budget preparation, financial tracking and the management of multimillion dollar endowments. Susan's ability to build teams, with a area of strength, which has led to outstanding team performance.

Throughout Susan's professional experiences, she has partnered with and engaged top institutional and volunteer leadership, faculty, physicians, researchers and scientists to apply innovative, incisive strategy and creativity to identify, vet, cultivate and solicit a range of donors and to identify key fundraising priorities and the next "big idea" to transform the institution. Susan has a personal track record identifying, cultivating, soliciting and securing gifts from principal and transformational donors, including the donor who made the largest single cash contribution in the history of Johns Hopkins Medicine.

In many instances Susan's role was to enhance existing institutional advancement programs and in doing so, she developed a clear appreciation for, and understanding of the role of culture in change management, and the imperative to work collaboratively with multiple stakeholders. Susan has successfully negotiated the complexity of institutions and has represented their vast body of work to grateful patients and alumni, prospects, donors and stakeholders, locally, nationally and internationally, now having lived, worked or traveled in over 80 countries.

## **FORMAL EDUCATION**

University of Colorado, Bachelor of Arts, Political Science

## **PROFESSIONAL, CONSULTING AND VOLUNTEER EXPERIENCE BY SECTOR**

### **Healthcare**

Johns Hopkins University, Johns Hopkins Medicine, Executive Director Institutional Giving/Director Principal Gifts, Maryland

Baycrest Foundation, President, Toronto

Baycrest Health Sciences Centre, Vice President Global Institutional Advancement, Toronto

National Jewish Health, Associate Director Major Gifts/ Manager Foundation and Corporate Relations, Colorado

Denver Children's Home, Director of External Affairs, Colorado

de Souza Institute, Consultant, Toronto

Centre County Woman's Resource Center, Consultant and Advisor to the Board, Pennsylvania

Denver General Hospital Emergency Room, Volunteer Rape Crises Counselor, Colorado

### **Education**

Ontario College of Art and Design University (OCAD U) Foundation, President, Toronto

Penn State University, Director of Development, New York Office of Regional and Leadership Gifts, Pennsylvania

## PROFESSIONAL, CONSULTING AND VOLUNTEER EXPERIENCE BY SECTOR

### **Community Based Membership and Advocacy**

Heart and Stroke Foundation of Canada, Chief Development Officer, Toronto

National Alliance for the Mentally Ill (NAMI), NAMI Research Institute, NAMI Anti-Stigma Foundation, Director of Development, Washington, D.C.

Center to Prevent Handgun Violence & Handgun Control Inc., Director of Development, Washington, D.C.

Human Rights Campaign Fund, Director of Development, Washington, D.C.

Aspen Institute Middle East Investment Initiative (MEII), Consultant, Washington, D.C.

EPOColorado, the Equal Protection Campaign, Consultant and Finance Director, Colorado

Equal Protection Ordinance Coalition, Consultant and Finance Director, Colorado

Legacy Foundation, Board Member, Washington, D.C.

Colorado NARAL, Board Member, Colorado

Colorado Association of Senior Citizens, Board Member, Colorado

Dames for Humanity Syrian Refugee Sponsorship Group, Founding Member, Toronto

Josie Heath for US Senate, Consultant and Director Political Action Committee Fund-Raising, Colorado

Pena for Denver, Finance Director, Colorado

Ben Nighthorse Campbell for Congress, Fund-Raising Director, Colorado

W Mitchell for Lieutenant Governor, Deputy Campaign Coordinator, Colorado

Stratton, Reiter, Dupree & Durante, Campaign Consultants to Presidential Candidate Gary Hart, Colorado

### **Arts and Culture**

Ontario College of Art and Design University (OCAD U), Vice President Global Institutional Advancement, Toronto

Factory Theatre, Board Member, Toronto

### **Public Sector**

Colorado Legislative Council, Colorado General Assembly, Research Analyst, Colorado

Colorado Office of State Planning and Budgeting, Fiscal Note Processor, Colorado

# Our Associates: Georgina Steinsky, *Executive Associate*



Aleksandar Antonijevic Photography  
[www.aleksandarantonijevic.ca](http://www.aleksandarantonijevic.ca)

GEORGINA STEINSKY has had a multi-faceted career within Canada and internationally as a senior executive. Her experience ranges from senior official and Deputy Minister in the Government of Canada, to executive positions in major Canadian corporations. From 1990-95 she led the project to recreate company presence in the post-Communist Czech Republic for the Bata Shoe Organization. In these various capacities she has undertaken foundational work either in creating new organizations or undertaken major organizational restructuring and governance reform.

Georgina gained invaluable insights into the structure and nature of the charitable and nonprofit sector in Canada when she became Chief Executive Officer in 2004 of the then Canadian Centre for Philanthropy, tasked to put in place a new strategy, and organizational and governance structure for what is now Imagine Canada - a national charity which today works alongside other charitable sector organizations - and often in partnership with the private sector, governments and individuals in the community - to ensure that charities continue to play a pivotal role in building and enriching Canada. Imagine Canada's work also included knowledge dissemination about best practices in the nonprofit and charitable sector, including matters related to governance.

In parallel throughout her career, she has also had extensive experience as a senior volunteer. Since 2004 she served both as Chair and on the Board of two organizations whose creation was encouraged, and supported by the Government of Ontario: Plexus and OECM, both nonprofit corporations created to foster supply chain efficiencies in the Ontario Health and Education sectors respectively. During her tenure, both start-ups became fully functioning organizations with governance based on best practices.



## FORMAL EDUCATION

University of Toronto, Master of Arts, History

## PROFESSIONAL, CONSULTING AND VOLUNTEER EXPERIENCE BY SECTOR

### Private Sector

Bata Shoe Organization, Senior Human Resource Officer, Toronto

Bata Shoe Organization, Chief Country Negotiator and Country Director General Operations, Czech Republic

Manulife Financial, Senior Vice President, Human Resources and Public Affairs, Toronto

Bell Canada, Chief Human Resource Officer, Montreal

CGI, Consultant, Toronto

IBM Canada Advisory Board, Board Member, Toronto

Cogeco Cable Inc, Member Board of Directors, Montreal

Glebe Parents' Day Care Centre, Volunteer Founder , Ottawa

### Public Sector

Government of Canada, Parks Canada, Historian, Ottawa

Government of Canada, Department of Indian Affairs and Northern Development, Office of Native Claims Director, Specific Claims Section Ottawa

Government of Canada, Department of Energy Mines and Resources, Director General, Natural Gas Branch, Ottawa

Government of Canada, Office of Federal Provincial Relations, Privy Council Office, Assistant Deputy Minister, Economic Affairs, Ottawa

Government of Canada, Department of Regional and Industrial Expansion, Associate Deputy Minister, Ottawa

Government of Canada, Department of Supply and Services, Deputy Minister, Ottawa

Canadian Broadcasting Corporation, Consultant , Ottawa

Government of Ontario, Management Board, Consultant, Toronto

External Advisory Group on Human Resource Modernization in the Canadian Public Service , Advisory Group Member, Ottawa

## **Public Sector, continued**

Federal Expert Panel on the Role of Gender Analysis in the Making of Federal Policy, Chair of 3-member Expert Panel, Ottawa

## **Community Based Membership and Advocacy**

Canadian Centre for Philanthropy/Imagine Canada, President and Chief Executive Officer, Toronto

The Glebe Report, Volunteer co-founder and writer, Ottawa

Women's Vote , Volunteer , Ottawa

Montreal Chamber of Commerce, Member Board of Directors, Montreal

Public Policy Forum, Member Board of Directors, Ottawa

Masaryk Memorial Institute, Consultant, Toronto

Foundation for the Advancement of Civil Society, Consultant, Czech Republic

## **Healthcare**

Baycrest Centre for the Aged, Member Board of Directors, Toronto

Plexxus, Member Board of Directors and one 3-year term as Chair, Toronto

Westpark Hospital Foundation, Member, Board of Directors, Toronto

## **Education**

Ryerson University, Member Board of Governors, Toronto

Masaryk University, Special Guest Lecturer in Two English Language Summer Programs, Czech Republic

Ontario Education Collaborative Marketplace (OECM), Chair, Board of Directors, Toronto

Centre for European, Russian, and Eurasian Studies, The Munk School, University of Toronto, Executive in Residence, Toronto

## **Arts and Culture**

Arts for Children Foundation, Member, Board of Directors, Toronto

Bata Shoe Museum, Member Board of Directors, Toronto

## Contact Us:

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