



S. Sutton & Associates

Consultants in Philanthropic Management

S. Sutton & Associates 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.

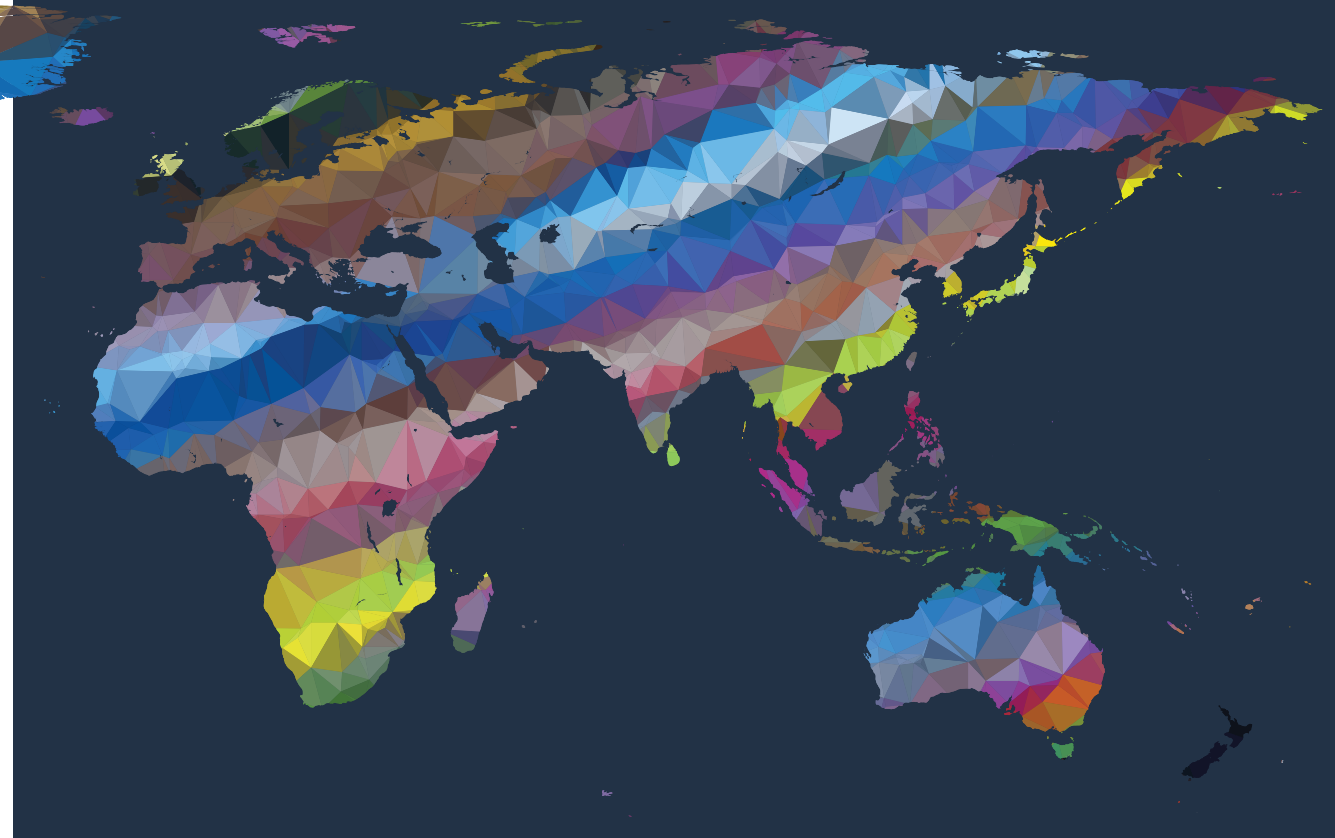
Our Firm

S. Sutton & Associates 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 assists in developing and implementing best practices to facilitate sustainable philanthropic success.





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 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 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 brings expertise to this sector and to donors in their pursuit of community support and impact.

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 brings insight, sensitivity and highly skilled technical expertise to this sector and to domestic and international prospects and donors.

Our Approach

S. Sutton & Associates provides strategic direction and technical expertise in all facets of philanthropic management in diverse organizational and world cultures. Our highly experienced consultants help our clients achieve their immediate philanthropic objectives while enabling elevation of performance for long-term, sustainable growth.

Collaboration

S. Sutton & Associates serves as partner with our clients to build philanthropic capacity. Our consultants 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 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 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 applies rigor and seeks clients eager to set ambitious goals and align activity to achieve results.

Results

S. Sutton & Associates 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.



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the benefactor

Counsel and Support for Philanthropists

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

At the core of our relationships with our clients is a shared commitment to maximize philanthropic investment to achieve significant impact. S. Sutton & Associates 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.

Strategic Planning and Best Practices Approach to Philanthropy

What is your dream for the future? What good would you like to see in the world? You already have an accountant, a wealth or investment advisor. He or she properly focuses on what they know best: money. There is enormous variability in what they may know about the philanthropic process or a given organization's ability to work effectively and efficiently with your generous philanthropy. This is where we come in. S. Sutton & Associates has the know-how to turn your vision into reality.

Top philanthropists are strategic and disciplined in creating and executing a thoughtful plan. They know their top priorities – the causes they want to invest in – and they know how they will measure their success through metrics of impact, return on investment and progress.

We work with our clients to develop a plan that is consistent with their personal values and financial goals, but which also incorporates flexibility to allow for evolution as times and circumstances change.

We help you provide support that is the most meaningful to you and the most useful to the sectors and causes you care about. Is your focus art, design and culture, community based membership and advocacy

organizations, education or healthcare and research? Are you interested in student support and scholarships, general operating support, specific programs, capital, equipment or infrastructure? Do you want to support one organization, several in a community, or several organizations working on the same issues from different angles, in different geographic regions or globally?

To shape such a philanthropic plan, we start by helping you answer several critical questions:

- What or who do you want your giving to benefit?
- What are you trying to achieve with your donations of money, time or assets?
- Why are you giving? Do you have a specific legacy in mind? What is your motivation?
- How much and what assets are you capable of giving?
- How much involvement do you want with various organizations?
- If you have a family or children, how may they benefit by being involved in the process?

Impact Measurement, Performance Assessments and Accountability

You know how to build wealth; you've done it. But many donors who want to engage in philanthropy often lack the time, interest or know-how to evaluate a charity's performance, often confusing accountability with achievement.

There is no real way for you to gauge the effectiveness of the particular causes or the institutions you may want to support. Guidestar, Charity Navigator or the Better Business Bureau are important resources but they really can't tell you how well your grant will be utilized – or the charity's innate ability to fulfill your trust. Or not. How will you know if your contributions are making a difference? By what criteria will you evaluate your existing donations and future charitable opportunities?

S. Sutton & Associates provides a different lens to vet performance of organizations. We help you determine criteria for impact and performance, assure your gifts are used as intended, your name is protected, and there is complete adherence to terms articulated in gift agreements.

Strategic Philanthropic Portfolio Construction and Tactical Counsel

S. Sutton & Associates represents you and your values, identifies opportunities which resonate with you, provides the information you need to make sound giving decisions and does the follow-up to make sure your gifts have their intended result. To construct the most strategic portfolio we:

- Work through the family dynamics to energize the family's giving or take it in a new direction
- Develop a process to engage your children or grandchildren in giving
- Identify or develop opportunities to make a difference which are in alignment with your philanthropic objectives
- Explore areas of giving where you have less expertise
- Reduce the volume of requests you need to consider... and most often decline
- Get to know a nonprofit's work well before introducing you to them as a potential major donor
- Identify ways to stretch your dollars further through highly strategic gifts or collaborations
- Conduct research, perform due diligence and fully vet opportunities and organizations to make sure your gift will be used well, your name will be protected, and construct gift agreements accordingly
- Work through the delicate process of discontinuing funding of organizations you have supported over time
- Analyze how loans, philanthropic equity, social impact bonds, or impact investments as well as grants, might contribute to your giving strategy

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First Principles

Best Practices

Every philanthropic enterprise has a unique mission, base of constituents, and history. Understanding these distinctions, strengths and accomplishments as well as challenges and opportunities is critical. Despite these distinctions it is more important today than ever to adopt best practices that guide successful philanthropy. S. Sutton & Associates can help bring your organization and its philanthropic management programs into alignment with best practices. We offer clients an understanding of their current state and the methods, processes, and systems proven to optimize success—within their sectors and, as applicable, from other sectors. Our experience combined with our strategic, analytical, and technical expertise in all facets of philanthropic management enables our clients to achieve their philanthropic objectives and build capacity for future success.

Evidence-Based

Challenges in the nonprofit arena and in philanthropic management have always existed, but today, with exploding needs worldwide, contracting public sector budgets, competition for support, shifting societal values and the constant introduction of new technologies, navigating the philanthropic landscape has become much more complex. As a result, a core best practice for any philanthropic enterprise is to embrace an evidence-based approach, collecting objective data to inform decision-making. S. Sutton & Associates bases all strategy and implementation on objective evidence to optimize success.

Methodology

Recognize Opportunities

Change creates opportunity. Shifts in political, economic, business environments, or ecosystems, transitions in staff or board leadership, strategic or campaign planning or evolution/launch of a new program, can be harnessed to optimize success going forward.

Audit, Evaluate, Assess

Information drives process. We capture and use data to conduct a comprehensive audit, evaluation and assessment to inform next steps to strengthen your philanthropic efforts.

Create Roadmap

S. Sutton and Associates translates evidence – based actionable recommendations into strategy and action steps, providing a strategic, comprehensive roadmap to achieve your goals. With hands-on assistance we apply a framework to help your team implement recommendations.

Philanthropic Support and Counsel for the Nonprofit Sector

Advancement Services

Alumni Relations and Giving

Annual Giving and Direct Marketing

Board Training, Management and Governance

Corporate Sponsorship and Philanthropy

Data Analytics

Development Program Review and Expansion Strategies

Donor and Constituent Engagement

Fundraising Campaigns and Strategic Planning

Interim Program Management

International Fundraising

Major and Principal Gifts

Planned and Legacy Gifts

Project Management

Risk Management and Fundraising Governance

Core Values

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

Our Professionals: Susan Sutton, *Principal*

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 commitment to excellence and diversity and train, mentor, manage and lead senior staff, is a recognized 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.



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Aleksandar Antonijevic

Fine Art Photography
aleksandarantonijevic.com

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

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



Photograph by Aleksandar Antonijevic
Fine Art Photography aleksandarantonijevic.com



Contact Us

S. Sutton & Associates 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.

We are committed to maximizing philanthropy to achieve significant impact, we embrace and drive transformational change, we build relationships through communication and respect and we apply creativity to support excellence.

We are interested in working with you to achieve your goals and invite you to contact us to begin the conversation and to explore a transformational journey in support of your mission.

www.SSutton-and-Associates.com
Contact@SSutton-and-Associates.com
647-969-8866



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www.dittmandesign.com