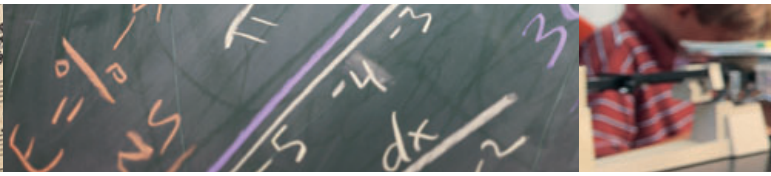
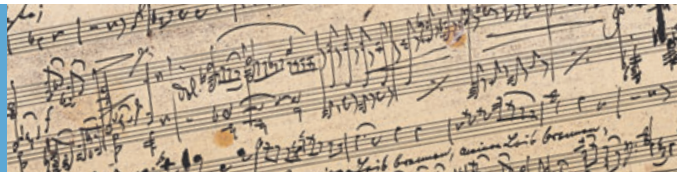
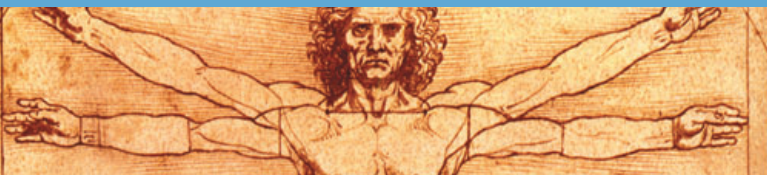




Blending the Art & Science of Philanthropy

Marts&Lundy
Innovators in the
Art & Science of Philanthropy





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We know that your forthcoming capital campaign, your annual fundraising campaign, and your entire development program must succeed.

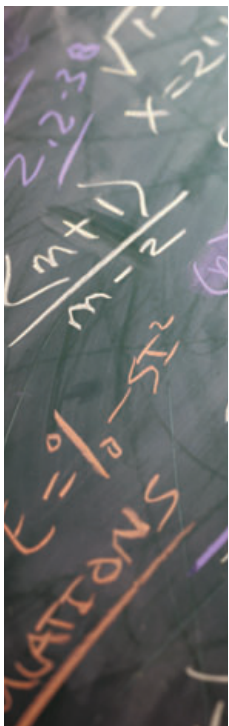
The responsibility for your success ultimately lies with you. Consequently, every year hundreds of institutions and organizations find fundraising counsel a valuable ally in the increasingly intense competition for philanthropic giving. And this is true whether an experienced staff is already in place or whether there is little or no staff assigned to fundraising responsibilities.

Considering Fundraising Counsel

With dedication to understanding the unique needs of each individual client, Marts & Lundy has served thousands of universities and colleges, independent schools, cultural organizations, service and advocacy organizations and healthcare organizations since 1926. Our ability to see the big philanthropic picture ensures that every institution, no matter how large or how small, receives the specialized counsel necessary to maximize its potential.

We'd like to discuss your fundraising counsel needs. We know that an understanding of these needs will arise from assessment of your unique position, in-house capacity, constituency and special challenges. And the accuracy and honesty of that assessment is a crucial first step in your fundraising planning.

This brochure presents Marts & Lundy's range of services, as well as our vision and an overview of how we blend art & science in order to help you reach your goals. After your review, you can call one of our offices around the country to arrange a meeting at no cost or obligation.





Why Retain Counsel?

Perspective

Consultants bring an unbiased, outside, strategic point of view based on the best experiential and quantitative practices in philanthropy. While each client works with a lead consultant, the collective resources of the entire firm — strategic planning, communications, fund development, alumni relations, quantitative analysis, and so forth — are available.

Capacity Building

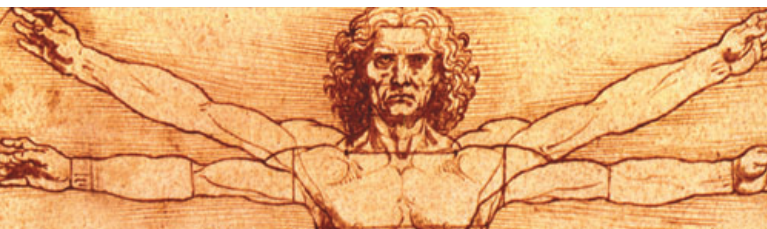
Organizations and their leadership must establish and grow a culture of philanthropy, a culture that allows an institution or organization to confidently and boldly reach for its full philanthropic potential.

Problem Solving

Every client is unique, and by utilizing fully customized solutions, consultants have a great deal of experience in problem solving. In fact, this is often where they add the most value. Whether it is a technical problem in advancement or a quandary that no one has yet faced, good consultants deliver fresh thinking that allows them to tackle problems of all kinds with creativity and enthusiasm.

Advice Without Bias

The consulting relationship provides leaders with pure insight and information of the type that almost always comes from outside the organization and mitigates the potential for self-interest or cultural bias. Years of experience dealing with similar challenges and relationships allow consultants to bring expertise to the table, but without the possibility of a self-serving agenda.



Why Marts & Lundy?

Blending Art & Science

With data and insight from hundreds of recent and current campaigns, Marts & Lundy brings to your organization the information and perspective you need for success. By applying innovations in philanthropy with knowledge gained from almost 80 years of skilled practice, your institution can be confident of maximizing its potential.

Established Standards of Professionalism

Our staff members, on average, have ten years of experience at Marts & Lundy and nearly 25 years experience in the profession. You will see on their résumés dozens of past and current clients – clients you can call to get feedback on Marts & Lundy.

National Reach, Local Perspective

With offices around the country, Marts & Lundy professionals bring you the resources, perspective and contacts of a nationwide organization with the benefits of local knowledge and understanding.

Continuity and Responsibility

Marts & Lundy has been serving clients since 1926. Every member of the firm has a personal stake in our long-term reputation because Marts & Lundy is wholly owned by its employees.

Full Spectrum of Counseling and Special Services

Fundraising fundamentals don't change, but today the effective application of those fundamentals is specialized, diverse and often complex. We believe this to be the art of consulting. We are a big enough firm to have top specialists in areas such as capacity analysis, benchmarking, planned giving, development office operations, strategic communications and specialized writing services.



The art of philanthropy, driven by insight into human nature, emerges in the relationships we build with our clients. This insight is both responsible for and a result of our extensive experience as philanthropy strategists.

Philanthropy is changing, and Marts & Lundy is proud to be at the forefront. It no longer suffices to understand behavior; now the best campaigns are dramatically enhanced through screening, assessment and statistical analysis. The science of philanthropy includes a vast array of new

Blending Art & Science

analytical tools providing data-driven, quantifiable results. Marts & Lundy consultants assess, analyze and implement strategies for nonprofits to ensure they benefit from the unique opportunities that define them.

Marts & Lundy is a full-service, strategic fundraising consulting firm, committed to a set of values and a code of ethics penned in 1926 by our founder, Dr. Arnaud Marts, with uncompromising client service as the primary objective. Our experience in the art of philanthropy allows us to effectively use the innovative tools that are transforming philanthropy. It is the successful blending of art & science that sets Marts & Lundy apart from other firms.

We are prepared to place the entire resources of our firm at your organization's disposal to ensure that we fully meet your needs.

Counseling

Counseling is at the core of what we do. We believe that your institution's philanthropic capability, whether large and sophisticated or the province of one individual, is a crucial asset. A fundraising campaign can be viewed as a series of options: the ones that you choose shape not only your campaign, but also your organization's long-term philanthropic potential.

Marts & Lundy consultants are development strategy specialists. They will help you choose the

Marts & Lundy Services

best options, taking full advantage of our cumulative knowledge of successes and disappointments at institutions like yours, new ideas in the field, and above all, knowledge of what probably lies ahead in your campaign or for your program.

Today, planning for a major campaign begins months or years before formal announcement of the campaign. The earlier you involve professional counsel, the more effective (and cost effective) counsel can be.

Comprehensive Capacity Studies

Using a blend of art & science, combining quantitative analyses with personal interviews, a capacity study will give your organization insight into the likelihood of campaign success at any given level. Using capacity analysis, staff yield analysis, benchmarking and several other measures, we will define the steps necessary to help you reach your goal.





Our Values & Ethics

- 1 We will serve those institutions/organizations that have responsible volunteer boards, serve a meaningful role in their fields and operate within the guidelines of applicable state and national statutes.
- 2 We will undertake to serve those development programs in which we believe our involvement can make a positive difference.
- 3 We will serve clients on a fixed-fee basis, and not on a percentage basis. To do the latter would create the impression that our earnestness and zeal were for financial gain.
- 4 The interest of the client will always come before our own.
- 5 Our publicity will make no false or misleading claims as to our ability to achieve success for our clients.
- 6 Members of the firm will at all times conduct themselves in a thoroughly professional manner.
- 7 Members of the firm will give themselves wholeheartedly to the development program of the institution/organization they are serving.
- 8 We will help our clients conduct development programs of such quality that there will be two results:
 - The constituency of the institution will become more thoroughly familiar with its character, ideals and objectives.
 - Such goodwill for the institution will be built that the result will be continuing, generous support in future years.

Our Commitment to You

Philanthropic giving expresses deeply held values such as voluntary action, private initiative and stewardship of wealth. And it is growing. Indeed, in most years since 1955, such giving has increased in current and constant dollars.

Marts & Lundy was founded in 1926 by two individuals who recognized that systematic fundraising would encourage and foster the spirit of volunteering and giving. Marts & Lundy consultants capture the spirit of philanthropy by bringing creative solutions to every unique institution, innovating in fields from major-gift strategies to the modern capital campaign itself.

Will you give us the opportunity to discuss your needs and answer your questions, without cost or obligation?

800-526-9005 • www.martsandlundy.com

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