

## **OUR MISSION**

Innovative Philanthropy is your personal guide to the world of charitable giving. We understand and advise the many faces of altruism -- individual donors, foundations, corporations and nonprofit organizations. Our mission is straightforward: we help our clients implement unique approaches that make sense and achieve inspired results.

## **OUR PRINCIPLES**

### **Creating a vision that makes sense**

We help you develop a philanthropic approach that reflects your goals, values and dreams. We want your commitment to have a clear direction and meaning. We work with you to create an effective strategy that allows you to make a tangible impact—be it on one life, a neighborhood or the world—that is aligned to your personal philosophy or organization mission.

### **Sharing a mission that others will embrace**

We help you present a clear picture of your mission to those unfamiliar with your work. We analyze your past performance and offer an honest appraisal of your efforts. We then help create a message that appeals to all sectors, but accurately reflects your priorities.

### **Strengthening leaders and organizations for the future**

We believe in strengthening the human resources that define and determine the future of a mission. We are acutely aware that the people behind an idea are integral to its success. We help you identify and build the leadership needed to ensure long-term stability.

## **OUR AREAS OF FOCUS**

Innovative Philanthropy advises individuals, families, foundations and corporations on mission, strategy, grant making and assessment. We also provide hands-on services to nonprofit organizations in fundraising, event planning, board recruitment and development, and executive training.

### **Fundraising and Donor Relations**

We help nonprofit organizations develop a straight-forward, cohesive fundraising plan that will leverage an organization's resources effectively to increase its visibility with individual and major donors. We walk you through the fundraising process to strengthen the stability of your organization. We start with your own Board and current donor universe and expand your contacts in a practical manner. Our goal is to develop new individual, foundation and corporate partners who will make a long-term commitment to your mission.

## **Board Recruitment and Development**

Innovative Philanthropy recognizes that the future of an organization lies in its ability to build and strengthen a dedicated, responsible, and motivated Board that will help you face future challenges. We understand and advise many individual donors who wish to deepen their commitment to public service and would like to explore serving on the Board of Directors of a nonprofit organization.

## **Event Services**

As a vital component of a healthy fundraising program, events provide organizations with a unique arena to reenergize their loyal donors and cultivate prospective supporters. From choosing a menu for your benefit dinner to helping you solicit co-chairs and drive your fundraising, we will customize our services to assist with your specific event-fundraising needs.

## **Philanthropic Advising**

We work with you through every step of the giving process to design and implement the crucial principles that will guide your mission. We aim to turn raw generosity into an effective, focused investment that results in a win for both you and society. Whether you want to make a one-time donation or establish a grant making structure, we educate you about your charitable options. We help start up new foundations and reinvigorate established institutions. We assess all past giving and manage the selection and monitoring of current and future grants. We also conduct intensive due diligence reviews that explore both the quantifiable and intangible aspects of an organization to understand the quality of a program and its relationship to the community it serves. Above all, we make your interest and intent happen.

## **Executive Advising and Training**

We support nonprofit leaders that face new challenges in management, fundraising and growth. We offer an honest, seasoned review of your organization's staffing, structure and programs. We then help you develop the skills and systems needed to ensure the future health and success of your organization.

## CLIENTS

Since 2002, Innovative Philanthropy has been fortunate to work with a vast range of nonprofit organizations, charitable foundations, corporations, high net worth and high profile individuals. Below is a partial list of our past and current clients.

A CALL TO MEN  
ABC<sup>2</sup>  
Advocates for Children  
African Leaders Malaria Alliance  
Agahozo-Shalom Youth Village  
American Academy in Berlin  
American Red Cross  
Andrew Glover Youth Program  
Arience Foundation  
Atlantic Philanthropies  
Baby Buggy  
Blue Ridge Foundation  
Business Council for International Understanding  
Center for Jewish History  
Child Center of NY  
Children's Rights  
Coalition for Hispanic Family Services  
Coro New York Leadership  
Credit Do  
Elizabeth Glaser Pediatric AIDS Foundation  
Eyebeam  
FFAWN  
FNP Cares Foundation  
Food Allergy Initiative  
Food Bank For New York City  
Global Kids  
Good Shepherd Services  
Greenhope Services for Women  
Happy Elephant Foundation  
Harlem Village Academies  
HELP USA  
Hudson Guild  
India Cultural Center of Greenwich  
Ippolita Foundation  
Joyful Heart Foundation  
Lalela Project  
Lighthouse International  
Literacy Inc. (LINC)  
Love Heals  
Maestro Cares Foundation  
Malaria No More  
Melanoma Research Alliance  
myGoodDeed.org  
Naomi Berrie Diabetes Center at Columbia  
Natan  
Neurosciences Institute  
New York Hall of Science  
New York-Presbyterian Hospital  
New York University Clive Davis School of Music  
New York University Hospital for Joint Diseases  
New Yorkers For Children  
ONE  
Peace First  
Rochester Hospital Foundation  
Safe Kids Worldwide  
Single Stop  
South Asian Women's Leadership Forum  
Summer Search  
The Barefoot Foundation  
The Candie's Foundation  
The Children's Storefront  
The Clark Foundation  
The Family Center  
The GO Project  
The KTR Fund  
The Leary Firefighters Foundation  
The New York Center for Children  
The Sirius Fund  
The Studio School  
Tribeca Film Institute  
University of Notre Dame – DeBartolo Performing Arts Center  
Urban Zen Foundation  
US Bobsled and Skeleton Federation  
USC Annenberg Center on Communication Leadership & Policy  
Viacom  
Women in Need  
Women's Sports Foundation  
World Education & Development Fund  
Worldwide Orphans Foundation  
York Theatre  
Young Eisner Scholars

## LEADERSHIP TEAM

### **Jennifer Grubman Rothenberg** **Founder & President**

As Founder and President of Innovative Philanthropy, Jennifer Grubman Rothenberg works with a wide array of philanthropic organizations and individuals to achieve breakthrough results around fundraising and donor relations, events, organizational strategy-setting, grant making and board of director development.

Prior to founding Innovative Philanthropy in 2002, Jennifer was a successful fundraising executive at The Robin Hood Foundation, a major philanthropic organization targeting poverty in New York City. During her tenure there, Jennifer focused on designing high-impact new fundraising programs, improving fundraising campaign effectiveness, and growing the foundation's donor base.

Jennifer began her career of community service as an assistant district attorney with the Westchester County District Attorney's Office in the Appeals and Special Litigation Bureau where she focused on domestic violence and child abuse cases. Prior to that, while in law school, she served as an intern for the Legal Aid Society in the Law Guardian Department and at Sanctuary for Families, a domestic violence organization. Jennifer holds a J.D. from the Benjamin N. Cardozo School of Law in New York City and a B.A. from Boston University. She was admitted to the New York State Bar in 2000. Jennifer is currently a member of the Board of Directors of Cardozo Law School, 21/64, Washington Market School and Robin Hood's Leadership Council.

### **Elizabeth Litsch** **Vice President, Operations and Events**

As Vice President of Operations and Events, Elizabeth Litsch manages several of Innovative Philanthropy's fundraising events. She specializes in databases, mail merges, revenue tracking, seating and golf outings. Prior to joining Innovative Philanthropy in 2008, Elizabeth worked in ticketing and merchandise in minor league baseball and college athletics. She holds a Masters in Education and a Bachelor of Science in Kinesiology from the University of Houston.

### **Mary Tierney** **Accounting Manager**

As Accounting Manager, Mary Tierney oversees the day-to-day accounting and office operations and procedures at Innovative Philanthropy. Prior to joining Innovative Philanthropy in 2007, Mary worked in this capacity in the insurance industry for twenty-five years.

## **FUNDRAISING AND DONOR RELATIONS**

Innovative Philanthropy provides an array of hands-on services to nonprofit organizations in fundraising and donor relations, focusing on active implementation of proven revenue-generating techniques. We can serve as your development department or support you on a project-specific basis. Our goal is to strengthen your organization by educating and training you in this vital area so that you can develop a sustainable year-round fundraising structure.

### **Fundraising Strategy**

Innovative Philanthropy helps nonprofit organizations develop cohesive, straight-forward fundraising plans that leverage an organization's resources effectively to increase its visibility with donors. Our goal is to develop new individual, foundation and corporate partners who will make a long-term commitment to your mission. We will:

- Develop an effective fundraising structure that will better organize and maximize your organization's human and monetary resources.
- Guide you through the fundraising process to strengthen your organization's understanding of different development tools and methods.
- Assess the infrastructure, relationship, and delegation of responsibilities between your Board of Directors, administration and staff in fundraising.
- Analyze your current donor universe and expand your contacts in a practical manner.
- Determine fundraising goals for individual and major donors, foundations and corporations.
- Draft fundraising materials for individual solicitations.

### **Board of Directors Engagement**

Innovative Philanthropy works directly with Board members to demystify fundraising and demonstrate how they can become successful rainmakers for their cause. We walk inexperienced individuals through the solicitation process and train all Board Members to be better fundraisers. We believe that 100 percent of your Board can become effective advocates. We will:

- Assess roles and responsibilities of current Board Members through interviews and surveys.
- Determine ways to strengthen Board members' involvement and commitment.
- Determine the requirements and expectations of Board members.
- Train Board Members in how to solicit funds in a successful and respectful manner.
- Deliver educational workshops and "pitch" sessions to Board Members.
- Create individual giving plan and goals.

## **Individual and Major Donor Development**

Innovative Philanthropy helps you develop effective ways to attract, cultivate and retain individual and major donors. We begin by establishing ongoing avenues to show new and old donors the impact that their support will have on the cause you serve. We aim to achieve transparency and understanding in the giving process and help you build a long-term and active donor base. We will:

- Perform on-site review of donor database and records.
- Analyze current individual giving by gift range.
- Review current donor base with the organization to determine:
  - who has given significant gifts and how to increase their giving
  - which event givers can be transitioned to non-event donors
  - who has lapsed and how to re-engage them
  - who is under giving and how to increase their giving
- Draft a comprehensive Board Member solicitation plan.
- Integrate Board members into the development process.
- Create target lists of individuals with the Executive Director and Board Members.
- Develop a plan to easily identify and approach individuals.
- Assist with research regarding individual prospects identified for solicitation.
- Determine and implement customized follow-up to prospects.
- Create and assess annual appeals.
- Coordinate cultivation events, including Board Member cultivation, receptions and informational sessions.
- Develop organized plan to thank donors for their support through letters and events.

## **Staff Recruitment and Development**

Innovative Philanthropy's fundraising philosophy is based on creating sustainable structures for nonprofit agencies. We expect to be a short-term answer to your long-term development needs. Our goal is to help you quickly achieve the ability to hire your own staff that will be able to continue our mutual efforts and grow on its own. To assist in this we will:

- Work with Executive Director and the Board Members or Board of Directors to build the fundraising department.
- Help structure development positions for the organization and prepare job descriptions.
- Establish clear objectives and mechanisms between the Executive Director, Board of Directors and development team.
- Interview and assist in the selection of the development team.
- Train and provide ongoing support to current and future staff.

## BOARD RECRUITMENT AND DEVELOPMENT

Innovative Philanthropy recognizes that the future of an organization lies in its ability to build and strengthen a dedicated, responsible, and motivated Board that will help you face future challenges. We understand and advise many individual donors who wish to deepen their commitment to public service and would like to explore serving on the Board of Directors of a nonprofit organization.

### Identify and Select

Innovative Philanthropy understands and appreciates the complexity that can surround the addition of one or more new dynamic personalities to a Board of Directors. We are extremely sensitive to your needs and work closely with you to determine the specific criteria for membership in your organization. We pledge to help you identify and approach a diverse group of prospects that will embrace your mission and stand by you during tough times. We will:

- Interview the Executive Director and key Board members.
- Survey the full Board to ensure participation and agreement.
- Develop the membership recruitment criteria in conjunction with the organization.
- Define the expectations and commitment required for potential new Board members.
- Develop and implement a Board recruitment strategy.
- Create a Board recruitment timeline and action plan.
- Identify a list of potential Board candidates who can help generate funding and are passionate and committed to the organization.
- Prospect Board candidates.
- Develop a strategy for reviewing and approaching candidates.
- Advise Executive Director and Board members during entire recruitment and selection process.

### Educate and Train

Innovative Philanthropy specializes in delivering individual and group trainings on fundraising and a variety of nonprofit management issues. Innovative Philanthropy educates Board members and candidates about their duties to an organization. We stress the responsibility to both give and get support for your organization and provide the tools and training needed to achieve a successful fundraising department. We will:

- Help create fundraising and other pertinent Board committees.
- Create customized, interactive workshops that address the strategy, design and implementation of a fundraising or other management plan.
- Provide a basic understanding of fundraising and other management concepts and systems, and offer concrete approaches for applying them to your organization.
- Assist in leveraging a Board's personal and corporate contacts.

## EVENT SERVICES

As a vital component of a healthy fundraising program, events provide organizations with a unique arena to reenergize loyal donors and cultivate prospective supporters. From choosing a menu for your benefit dinner to helping you solicit co-chairs and committee members to drive your fundraising, Innovative Philanthropy will customize services to assist with your specific event-fundraising needs. Our service menu includes, but is not limited to:

### **FUNDRAISING**

#### **Mailing Lists**

- Help build lists of prospective event attendees, including current base of support and new potential donors.

#### **Committee(s)**

- Work with organization to create an event hierarchy.
- Help organization develop a committee(s).
- When committee is formed, work with each committee member to mine their personal and business contacts and build their solicitation lists.
- Develop committee solicitation letters and reply forms and coordinate mailings.
- Work with committee members to personalize invitation package and execute accordingly.
- Work with committee members on follow-up and acknowledgement.
- Meet regularly with committee members regarding fundraising and event logistics.

#### **Honoree(s)**

- Work with organization to identify and approach honoree(s) from various industries (includes targeted research and prospect profiles).
- Serve as the liaison to honoree(s) – communicate event details to his/her office, obtain biographical information and photos of him/her for event materials, and assist him/her in soliciting support from friends and colleagues.

#### **Master of Ceremonies / Host**

- Work with organization to identify and select a master of ceremonies / host.
- Serve as the liaison to master of ceremonies / host – communicate event details to his/her office and obtain biographical information and photos of him/her for event materials.

#### **Save the Date and Invitation**

- Work with organization and graphic designer(s) to coordinate the theme, design, copy, and print production of the save the date and/or invitation.
- Organize the signing and insertion of personal notes by key people such as committee members, executives, and Board members.
- Coordinate stuffing, stamping, sealing, and mailing of save the date and invitation with mail house.



## **Journal**

- Work with graphic designer to define journal specifications and print requirements.
- Collect journal sales and corresponding advertisements from donors.
- Coordinate layout with designer.
- Coordinate printing.

## **Ticket Sales, RSVPs, and Revenue**

- Determine the best mechanisms for ticket sales and implement accordingly (e.g. mail, online, phone, etc.).
- Determine the appropriate tax deductibility based on “goods received” for invitations, acknowledgement letters, and other printed materials.
- Manage all incoming RSVPs and associated revenue.
- Send frequent RSVP and revenue updates to all relevant parties.
- Complete follow-up and acknowledgement calls as directed by the organization.

## **Silent / Live Auction**

- Research and identify prospective auction items.
- Work with organization to solicit, secure, and package auction lots.
- Coordinate the delivery of auction items to the event.
- Work with venue to create an auction display (for live and / or silent auction) to maximize bids.
- Manage live and / or silent auction logistics, including hiring and managing auctioneer, distributing bid cards, setting up bid sheets, and creating and managing silent auction payment and check out.
- Obtain contact information from highest bidders for each package.

## **Thank You and Acknowledgements**

- Generate and mail thank you letters to all contributors. These will comply with IRS stipulations.
- Coordinate personalized thank you notes to relevant recipients.
- Coordinate the delivery of special gifts (flowers or gift baskets) to key participants.

## **LOGISTICS**

### **Event Conception**

- Work with organization to define fundraising and marketing objectives for the event.
- Work with organization to develop an event format, which will position the organization to meet its fundraising and marketing objectives.
- If specific brand messages and/or event themes are used, (e.g. event tagline, logo, etc.), Innovative Philanthropy will work to ensure their consistent use throughout event production, décor, and written materials.

### **Venue Selection**

- Identify possible venues that meet organization’s requirements.
- Conduct site visits, compare venues, and work with organization to select final venue.
- Secure date with venue.
- Negotiate contract terms with venue.

## **Event Coordination**

- Coordinate décor and serve as the liaison for approvals to organization.
- Coordinate food and beverage logistics with venue and/or caterer and serve as the liaison for approvals to organization.
- Coordinate catering tasting and accompany organization's representatives to tasting.
- Coordinate other vendors as required by the program; manage their contracts, payments, and event-day production needs.
- Develop event program and run of show.
- Coordinate the design and production of printed materials for the event.
- Arrange transportation for honoree(s), master of ceremonies / host, and other key individuals for the event.

## **Seating**

- Work with organization to strategically seat guests.
- Conduct preliminary and final seating meetings using venue layouts to determine placement of guest.
- Produce final check-in lists.

## **Gift Bags**

- Collect and inventory gift bag items.
- Assemble gift bags.

## **MANAGEMENT AND STAFFING**

### **Budgeting**

- Develop event budget.
- Manage and maintain budget throughout the execution of the event.
- Determine and review revenue goals.
- Determine and review ticket and sponsor levels as they relate to revenue goals.

### **Event Timeline**

- Establish a working timeline that includes major tasks, responsible parties, and deadlines beginning with planning stages through post-event follow-up.
- Work with organization's key players to amend key dates and deadlines according to their calendars.
- Manage timeline and relevant parties involved in its execution.

### **Day of Event Staffing**

- Develop chain of command and communication plan for critical event-day decisions (clarify roles and responsibilities of Innovative Philanthropy and organization staff as well as vendors).
- Staff and manage guest registration.
- Manage production schedule, including all on-site vendors.
- Coordinate run of show, including all speakers' remarks, talent, A/V components, and overall timing and cues.
- Coordinate talent hospitality services.
- Coordinate staff members to distribute gift bags and thank departing guests.

## **Event Publicity Support**

- Work with organization's press team to leverage event highlights in pre-event press communications (e.g. calendar listings, radio spots, long-leads, etc.).
- Work with press team to determine press-related needs and logistics (step and repeat, greenroom, check-in, etc.).
- Execute press needs with appropriate vendors.
- Liaise with press team to determine protocols and best practices for media management at the event and following the event.

## **Meetings**

- Coordinate meetings between Innovative Philanthropy, organization, and other key individuals.
- Distribute meeting reminders before meetings and "next steps" after meetings.
- Coordinate debrief following the event.

## PHILANTHROPIC ADVISING

Innovative Philanthropy offers a comprehensive array of services for grant makers, whether they are individuals, families, foundations or corporations. We provide most of these services directly and maintain relationships with key strategic partners in order to manage all of your philanthropic needs in a comprehensive, effective manner.

We are committed to providing you with straightforward, customized assistance and responding to your every need. We aim to turn raw generosity into an effective investment that results in a win for both you and society.

### Grant Strategy

Innovative Philanthropy can help you start up a new foundation or reinvigorate an established institution. We work with you through every step of the giving process to design and implement the crucial principles that will guide your mission. We will:

- Assist in creating the vision, philosophy and focus of the giving instrument and help develop the mission statement.
- Select the most appropriate giving instrument to meet your needs.
- Design the giving instrument structure and operational plan.
- Provide current research about the areas you are interested in supporting.
- Assist in determining the role of the founders, leaders and Board Members.
- Develop a plan to create a measurable impact on the community served.
- Ensure that the focus aligns with corporate goals or brand attributes and provides valuable employee volunteer opportunities.

### Grant Administration

Innovative Philanthropy can bear the burden of all regular administrative tasks in a structured and transparent manner in order to allow you to focus on making vital decisions that further your philanthropic vision. We identify, select and monitor all past, current or future grants. We also conduct intensive due diligence reviews that explore both the quantifiable and intangible aspects of an to understand the quality of a program and its relationship to the community. Above all, we balance our findings with your interest and intent. Our services include:

- Prepare written grant making guidelines and procedures.
- Establish a review process to select organizations.
- Conduct due diligence on organizations for potential funding. Review includes these areas:
  - Organization effectiveness
  - Programmatic structure and evaluation
  - Fiscal management
  - Sustainability and future growth
  - Community relationships
  - Leadership, staffing and Board of Directors strength
  - Fundraising and other administration
- Manage inquiries; respond to grant requests and process applications.
- Evaluate grant proposals; conduct meetings and site visits.
- Help hire and train staff.

## Assessment and Monitoring

- Review all reports from grantees.
- Monitor the status and results of approved grants.
- Establish a solid relationship with grant recipients:
  - Support them in goal setting for the year
  - Monitor progress through site visits, phone calls, etc.
  - Guide them in preparation of reports and evaluation
  - Connect them to high-quality services and partner organizations
- Provide reports to the Board of Directors on results and status.
- Prepare official “board books” for grant review and records.
- Maintain database of all grants awarded.
- Establish and cultivate collaborations with other philanthropic institutions.
- Participate in professional networks to enhance grant making impact.

## Private Foundation Start-Up Services

Innovative Philanthropy is dedicated to helping individuals, families and corporations smoothly navigate and satisfy existing state and federal obligations when creating a new institution that will benefit our society. Those who are establishing a private foundation must meet the Internal Revenue Service and New York State Department of Charities requirements for tax-exempt status. Our wealth management tax consultants will guide you through these requirements. We will:

- Help you determine the giving instrument that most closely melds your charitable goals with your estate and investment plans.
- Ensure that the appropriate applications are completed and filed with the federal and state regulatory agencies.
- Prepare annual tax filings.
- Provide quality education on tax planning and compliance issues.

## EXECUTIVE ADVISING AND TRAINING

Innovative Philanthropy strives to strengthen the human resources that define and determine the success of an organization's mission. Our staff understands your short-and long-term needs and brings more than 15 years of direct service and administrative experience to you. We believe in a hands-on strategy-setting that will coach leaders in the art of practical planning, management and implementation.

We also specialize in delivering individual and group trainings on a variety of nonprofit management issues. We are uniquely qualified to provide you with the knowledge and support you desire, allowing you to better manage growth and navigate changes.

### Leadership Strategy and Support

Innovative Philanthropy is acutely aware that the people behind an idea are integral to its success. We support nonprofit leaders that face new challenges in management, fundraising and organization growth. We will:

- Work with executive directors to strengthen programs and increase the effectiveness and efficiency of client service delivery.
- Provide leadership, management and administrative training to inexperienced executive directors or other senior staff members.
- Consult on methods to enhance organizational systems and procedures.
- Lead projects designed to address supervisory and staffing challenges.

### Assessment and Structure

Innovative Philanthropy aims to help you identify and build the leadership needed to ensure long-term stability. We offer an honest, seasoned review of your organization's staffing, structure and programs. We then help you develop the skills and systems needed to ensure the future health and success of your organization. We will:

- Identify and help resolve an organization's management needs.
- Provide a general overview of an organization's strategy and effectiveness including:
  - Priorities, initiatives and challenges
  - Mission and its relationship to programs
  - Strengths and weaknesses
  - Administrative efficiency
  - Perception and reputation of the organization in the community it serves
- Perform a diligence review of an organization including the following areas:
  - Focus/Mission
  - Board of Directors
  - Fundraising
  - Organizational Structure and Staffing
  - Communication and Coordination
  - Program Development and Planning
  - Accounting and Finance
  - Human Resources and Technology
  - Evaluation and Compliance