

A Proposal for
A Campaign Feasibility Study
For
The City of Riviera Beach Library
In Response to RFP75716

August 3, 2016

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EXECUTIVE SUMMARY

This proposal presents Brakeley Briscoe Inc.'s response to request of the City of Riviera Beach ("The City" henceforth) for a proposal for a capital feasibility study testing a goal of \$2.5 million.

Brakeley Briscoe ("BBI") brings significant skills and experience to this engagement that will realize these benefits to The City:

- A highly experienced project team

We know both sides of the table as managers and consultants. We have seen best practices at work and have worked them. Each member of the consultant team has more than 20 years of senior level fundraising management and consulting experience. We have in-depth experience in counseling libraries, both public and private, in all aspects of campaign planning, preparation and implementation, including internal readiness audits and pre-campaign feasibility studies.

- In-depth knowledge of library fundraising.

Our firm has worked with a variety of libraries across the nation in campaign preparation and planning. This brings deep experience in managing fundraising programs with library staff, governing boards and friends groups. We are especially experienced in working with volunteers whose behaviors and expectations are often different from those of volunteers associated with other non-profits.

- Regional Experience

Our understanding of philanthropy in your region is important for your campaign study and campaign strategy. We have current and past clients in cities and towns up and down the East coast of Florida.

- Success in raising major gifts as line fundraisers

We bring in-the-trenches knowledge, as senior advancement officers and as consultants, of what it takes to raise sights and secure larger gifts than the client has realized previously. We bring tools developed over the last decade in institutional advancement that can further evaluate and segment the Library's prospect pool.

- A tailored approach

Every client is unique in its history, aspirations, traditions, culture and track record. Our approach in every case is flexible and adjustable to reflect those circumstances and characteristics.

- Fundraising counsel for the whole organization

Our service to our clients extends well beyond the techniques and tactics of basic fundraising and campaigning. We believe that fundraising success rests on strong governance and leadership along with solid strategic visioning and planning—a broad perspective we will apply to our work with The City and the Library in building a strong culture of philanthropy.

Our proposal provides in detail our approach to the assignment, beginning with a **Development Program Assessment**, which in most cases focuses on how effective the fundraising operation has been performing. In this instance, however, because there is no fundraising office or track record in fundraising or campaigns that we know of, we will assess what needs to be put in place in the way of an infrastructure to ramp up for and support the proposed campaign.

Even as the assessment unfolds, we will work with the Library to craft the documents that will be needed for the external study interviews, most notably a summary case statement that presents the rationale for the campaign couched in terms of the Library's mission, vision for the future, track record and aspirations. We are prepared to take the lead in preparing these documents if that best suits you.

In the **External Feasibility Study**, we will have thoughtful, carefully structured conversations with 30-to-35 selected representatives of the Library's real or potential constituencies, as many of them on an in-person, one-on-one basis as possible, plus perhaps a few focus group sessions.

These interviews with your "best" philanthropic prospects will inform our judgment with respect to the achievability of the proposed \$2.5 million test goal as well as the strengths and weaknesses of the fundamental criteria for successful campaigning. These are: the case for fundraising, the proposed funding needs, timing, fundraising leadership at all levels, and the philanthropic market potential for achieving the desired goal, as measured by our in-depth analysis of the prospect pool and what interview respondents have to say to us.

The chief deliverable will be a report presenting our findings, conclusions and recommendations, together with a strategy and plan for the campaign—in effect a road map for getting from here to campaign victory.

The BBI team will comprise George Brakeley, Executive Chair, and Anne Culp Storch, Senior Consulting Associate, each of whom brings many years of hands-on consulting experience in organizational fundraising generally and campaigns in particular for a wide variety of clients.

BRAKELEY BRISCOE PROPOSAL

Firm Qualifications

Brakeley Briscoe has served a wide variety of clients over more than nine decades across the nation, in the Americas, and overseas. The firm's origins go back to 1919. We currently maintain a roster of 37 consultants throughout the US and have six strategic alliances with related firms. Our specialties include fundraising capacity-building, board development, and capital campaign planning and management.

We have served a number of public and private libraries, currently and recently, including the Jamestown Philomenian Library (Rhode Island), the Marshfield Library (Wisconsin), and Hayward Public Library (California). A complete list of all of our library clients is enclosed with this proposal and others are mentioned in the following section.

We take great pride in producing practical plans that reflect each client's unique culture and traditions and doing it on time and within budget. We provide "Powerful Thinking, Creative Counseling."

The RFP's Special Questions

On page 13 of the RFP, it is requested that set of questions be answered in the order given. Our responses follow.

1. Time in business and number of planning studies: We have been in business continuously since 1919, starting then as the John Price Jones Company; then G. A. Brakeley and Co; then Brakeley, John Price Jones, Inc.; and now Brakeley Briscoe, Inc., which became our name in 2003. Over that time the number of studies we have conducted is in the many hundreds. In the past few years alone we have done twelve such studies.
2. Library campaign studies: Recent examples include The Alameda County Library (CA), Columbus Metropolitan Library (OH), Hayward Public Library (CA), City of Marshfield Library (WI), and San Francisco Public Library (CA).
3. Familiarity with the City of Riviera Beach: We have done no work in Riviera Beach *per se*, but we have had clients in Miami, Coral Gables, Ft. Lauderdale, Ft. Pierce, Dania Beach, Deerfield Beach, Lake Worth and Stuart. Moreover, we have worked in other parts of the country where many residents are "transplants" whose origins and loyalties often lie elsewhere.
4. Success rates: There is no useful percentage that we can quote, there being a wide variety of circumstances that come into play, one being how one defines "success." Another is that we are not always on the scene when a campaign ends, so that the final success is as much the client's as ours. Nonetheless, our track record of successful campaigns is strong; we would not have been in business for this long without a powerful track record of success.

5. Time frame: We project that the study described below will require as long as six months to complete. There are two major variables: a) The client is not always as ready as they think they are for the study; and b) the people we will want to see are often difficult to track down to make interview appointments, especially for an organization that is entering the campaign arena for the first time.
6. References: Detailed references will be provided in a separate section, to follow.
7. Vendor relationships: There will be none.

There was also a question in the RFP about municipalities with which we have worked generally. They include, in addition to the libraries mentioned in #2 above, the following: Mill Valley, CA (downtown beautification); San Jose (CA) Parks and Recreation Commission (skating and biking parks); City of Milwaukee, WI (lead abatement), the City of Plano, TX (performing arts center), and others in the more distant past.

The RFP also asks about our respective offices. Our headquarters are at 322 West Bellevue Avenue, San Mateo, CA 94402, telephone 650 344-8883, email info@brakeleybriscoe.com. This project will be managed by George Brakeley (bio to follow) from our office at 230 New Canaan Ave., #20, Norwalk, CT 06850, phone 203 912-3362, email gbrakeley@brakeleybriscoe.com.

SERVICES TO BE PROVIDED AND DELIVERABLES

General

This proposal is based on our understanding of your needs and desires at this time. Although we recommend the following scope of services at this point, we know that as your needs and circumstances change, we must be capable of adapting to those changing needs and adding or modifying services if required.

Our approach to providing services involves three overlapping steps: the internal development program readiness assessment; preparation for the external feasibility study; and the external feasibility study itself. The project concludes with the preparation of a report summarizing our findings, providing recommendations on campaign preparation, and projecting a feasible campaign goal and strategy.

Internal Development Program Readiness Assessment

The readiness assessment, as stated earlier, will focus on what needs to be done in terms of creating a fundraising infrastructure and in other respects to ramp up for a campaign. This will include consideration of staffing needs, policies and procedures and other resources.

The primary assessment methodology will be a set of in-depth individual interviews – perhaps ten in number - with the Librarian, selected senior administrators, appropriate City officials, and a small group of “inner circle” volunteer fundraising leaders. We will ask staff to schedule these internal interviews.

We may recommend that this work may include electronic wealth screening of all or part of the data base as a preliminary and rough means of estimating the philanthropic potential of your known constituencies, that is, friends, users and the like. We will be prepared to recommend a vendor for wealth screening.

We will also want to look into the role and function of the Library's governing board and the board of the Friends group with particular respect to such matters as strategic planning, committee structure, nominating process, and the extent to which its members are actively or are willing to be involved in fundraising activities.

The basic product of this part of our work will be a written set of recommendations, either as a discrete document or as part of the overall study report, which will be preceded by a number of less formal consultations throughout the period of the assessment.

The internal audit will take only a few weeks to complete. Even as it is proceeding, we will move right into the next phase, which follows.

Preparing for the External Interviews

The BBI team will work with you to create the documents and materials needed for the external interviews, beginning with the summary case statement, which might be two pages in length, presenting the underlying rationale for the campaign in terms of mission, vision for the future, track record and aspirations. We are prepared to write the case if necessary or work with your staff to edit it—whatever is needed in our collective judgment. The BBI team will also prepare an introductory letter to be sent to external respondents.

At this time we will also want to recruit and seat a small Steering Committee to oversee the external review. It might comprise the chairs of the Board and the Friends group, the Librarian, and a few volunteer leaders (especially any persons who might be candidates to chair the campaign). This group will learn about the study methodology, vet the preliminary case statement, and advise on the final selection of interview candidates. Individual members may be asked to help secure important interviews where needed. At the end of the project this group will reconvene to review and comment on the draft report and then pass it on to the governing board and The City. We recommend this step as a valuable way to build critical stakeholder buy-in to the process and outcomes of the campaign planning study.

The External Market Study

In the external market study we determine which individuals, businesses and foundations are most inclined to support the proposed initiative and why and how potential major and principal donors may wish to invest in the campaign. We do this through in-person, confidential interviews that are conducted with individuals and foundations that have the capacity to give importantly or otherwise direct significant philanthropic support to the Library. It is these persons' and entities' opinions that are critical to our understanding of what can be raised and how to develop the campaign plan. We suggest 25 to 30 such interviews.

We may also recommend that a few focus group sessions be conducted with individuals who may not be major gifts prospects but whose views are important. This is a technique that we have used in a number of studies. If, after discussions with the Steering Committee, it appears that a larger or smaller number of interviews or a different mix of face-to-face, telephone interviews or focus groups should be conducted, we will be flexible in revising the numbers, which changes may impact our bid.

External interviewee candidate selection is a joint effort. We will suggest criteria for considering whom to interview, but the Steering Committee (see above) plays an important role in this process. Our experience has been that it is necessary to select approximately a third again as many candidates as we expect to interview.

Selection is based on the candidates' current relationships with the Library. Consideration should certainly be given to the local foundations that support capital projects and possibly a few companies where there is a significant relationship or connection. We recommend a selected cross-section of Board members (current and past), current and historical top-tier donors (including foundations), prospective donors (those who are not supporting the Library but should be interested if approached) and perhaps a few individuals who may not be major prospects but who are knowledgeable about the City and the Library.

Interviews are conducted one-on-one by a senior Brakeley Briscoe team member (see below) at a venue of the interviewee's choosing. It is our strong preference to conduct them in person; the interview results are significantly more productive when they are done face-to-face. In addition, the study discussion can be viewed as a means of initial cultivation. The fact that a prospective donor is willing to meet in person may be an early indication of his or her interest in your plans in and of itself; the contrary is also true.

Each interviewee is provided with the preliminary case for support in advance of the meeting under cover of an introductory letter. During the meeting interviewers will probe these matters:

- What is the **image** of the Library?
- Is the need for the new building seen as **urgent and compelling**?
- Is the **case persuasive**?
- Are willing, capable and "right" **volunteer campaign leaders** available?
- Do respondents believe the **money is available** so that the **goal is achievable**?
- Can the interviewee identify **additional potential donors**?
- Do they **expect to make a financial contribution** to the campaign and at what level?
- Would they consider **taking a leadership role** in the campaign?
- Will **other campaigns** have an impact on the success of the campaign?

We do not use a survey-type questionnaire that prompts only 'Yes' or 'No' answers. Our interviews are one-hour, "structured conversations." They are designed to encourage the interviewees to respond confidentially to the above issues as well as to provide thoughtful reflections on all aspects of the project and its philanthropic ramifications. This results in a great deal of information and informed opinion on the campaign's prospects and potential.

For each interview we prepare by fully reviewing all of the materials made available earlier to the Brakeley Briscoe team. We will ask the Steering Committee and staff to provide anecdotal background information on each interviewee and in some cases will check them out on the Internet as well, so that we can understand the current relationship between the Library and the interviewee.

The BBI team is prepared to schedule the external interview appointments on its own.

Management Check-ins

Good communication is essential to the successful accomplishment of any objective. Brakeley Briscoe recommends check-ins between our project manager, and the key contact person at the client. These telephone conversations provide an ongoing opportunity to keep everyone up to date on the project, ask questions, and resolve any issues while they are still minor. They will usually be scheduled bi-weekly.

Report/Presentation/Deliverables

The primary deliverable is our final report.

After completing the readiness assessment and external feasibility study, the BBI team will prepare the report, which we will provide to the Steering Committee. The report will include our findings on the Library's strengths and weaknesses with respect to the proposed campaign; the conclusions to which those findings lead; and the recommendations for campaign preparation and design that are suggested by those conclusions. Most important, we will recommend an achievable but "stretch" goal and suggest the time frame for the campaign.

The report will include a campaign implementation plan, including milestones, recommendations for further wealth screening and prospect research for potential donors, and training for staff and volunteers. We will also recommend a campaign organizational structure for both staff and volunteers, with job descriptions for various individuals and groups vis-à-vis the campaign, including the Boards, the Librarian and senior staff, and other volunteers as they might relate to the campaign. Lastly, we will suggest the appropriate role that counsel might play in the campaign.

Then the BBI team will meet with the Steering Committee to review the draft report. Based on input from the Committee, we will make any necessary revisions to assure that the messages are clear, and we will produce a final report. Then we are prepared to help the Steering Committee in its presentation to the appropriate authorities.

In a separate document we will provide a list of potential lead donors whom we have uncovered in the course of our work, and a list of individuals who could be potential fundraising leaders.

A second deliverable is advice from day one of the relationship on any and all matters having to do with fundraising. We will look for opportunities to offer such advice as we go along, whether or not the matter of the moment is related to our campaign-related assignment. We will consider ourselves to be your consultants for the entire Library fundraising program, not just the campaign.

Timeline

As stated earlier, studies of this size take approximately three to four months, depending mostly on how quickly we jointly can produce the necessary interview materials and how available your external interview candidates are to meet with us within a reasonable timeframe. If the respondent list includes potential interviewees who have had little contact with the Library, it will likely take more time to obtain appointments and conduct the interviews.

Upon being retained, we will hit the ground running and will make every effort to have completed the study in less than the six month period mentioned earlier.

As for the campaign itself, most campaigns require three-to-five years from start to finish, but there are many variables that come into play. One important strategic consideration is whether the campaign will involve a relatively small number of large gifts, or be a City-wide effort wherein every person in the data base will be asked for a capital gift of some size. The answer to that question impacts importantly on staffing, resources and – especially – timing.

In any case, the duration of the campaign is one important finding that will emerge from the study.

Brakeley Briscoe's Team for The Riviera Beach Library

We will assign a team of senior fundraising consulting executives to conduct your study.

George A. Brakeley III, Executive Chair. George, who will serve as BBI's managing director and primary consultant on this assignment, brings more than 40 years of fundraising consulting experience to this project. He will conduct the internal assessment; will conduct about 50 percent of the external interviews and will lead any focus group sessions; and will be the principal author of the external study report. He has provided capital campaign strategic planning and campaign counsel for many clients over the years, including a number in Florida.

Ann Culp Storch, Senior Consulting Associate. A resident of Vero Beach, Ann will serve as the second team member, responsible for every aspect of the assignment, including the other half of the interviews. She is a veteran of more than 20 years as a development professional, and she is an experienced campaigner who was responsible for the largest gift ever made to an independent school (\$128.5 million).

Additionally, Brakeley Briscoe specialists may be called upon during the assignment to address specific issues of the moment.

Biographies of the team presented here are attached to this proposal. Biographies of all Brakeley Briscoe consultants are available at our website, www.brakeleybriscoe.com.

Should there be any prospective interviewees located outside the immediate region, our senior consultants, consulting associates and strategic partners situated throughout the U.S. ensure that interviews can be conducted in-person and in the most cost-effective manner.

References

Here are three recent clients that are relevant to this project one way or another.

City of Marshfield, WI: We advised and guided this town library campaign from start to finish, helping them to raise \$4.5 million against a \$4 million goal, concluding in late 2014. The person to talk to is Library Director Lori Belongia at 715 387-8494 or via email lbelongia@marshfieldlibrary.org.

City of San Jose, CA: We are currently advising the city's Parks, Recreation & Neighborhood Services Department in building a sustainable fundraising strategy for corporate and philanthropic funding for the City's Lake Cunningham Bike Park which will open in 2017. Funds raised will provide free admission to youth and establish funding for additional programs, equipment and services. Talk to Parks Manager Alex Pearson at 408 794-6512 or via email Alex.Pearson@sanjoseca.gov. Actions Sports Specialist Justin Beck can also be reached at 408 794-7576 or via email Justin.Beck@sanjoseca.gov.

York College, City University of New York: York is a commuter school that serves a remarkably diverse population. The relevance here is that it is a start-up situation where we have to strengthen their development program in order to position them for an eventual campaign for perhaps \$10 million. Put another way, it is a largely start-up situation. We are assisting them in putting the building blocks in place. Talk to the chief development officer, Jeannine Glazewski, at 718 262-5193 or via email jglazewski@york.cuny.edu.

We ask that, if these references are to be called, we be given a heads-up so that we can advise the references to expect a call.


Post-Study Services

We do not take on an assignment like this with any preconceived notion about whether and in what way we might have a continuing consulting role in the campaign that follows. Rather, we tailor our recommendation to the specific needs of the client. Whatever we recommend about a continuing role will be informed by the campaign strategy and plan and by our best judgment about whether the staff can take on the incremental work that the campaign will inevitably bring. Our campaign counsel services generally can be broken down as follows:

Strategic Counsel: In providing strategic counsel we normally assign one of our senior consultants to provide high-level counsel on the strategies of the campaign. Such counsel is likely to include one or two on-site meetings per month in addition to scheduled and unscheduled phone calls and emails as required. Strategic counsel would be provided by a BBI senior officer and would entail fee on the order of \$2,000 per day, plus expenses.

Campaign Management: If asked to provide campaign management, we normally assign one of our experienced campaign managers on site between one and five days per week. Our staff would partner with your staff to manage the campaign jointly. Half-time management, as an

Brakeley Briscoe Inc.

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example, which includes two days per month of a senior supervising officer in addition to the on-site presence, would cost in the neighborhood of \$15,000 per month.

Specialized Services: Along the way, the need might arise for advice and guidance in a specialized area such as in-depth prospect profiling, planned giving, social media, data analytics, wealth screening or writing services. One focus here would be hands-on training and coaching of volunteers and staff, especially in the fine art of asking for the big gift. Such services can be contracted for separately or bundled into an overall contract.

The Terms of Engagement

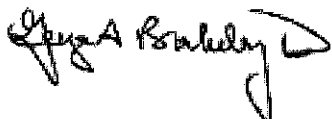
We are proposing to conduct this assignment as described above for the fixed fee of \$34,000, plus expenses.

Expenses will be additional and are charged at cost. The main expense will be travel expenses including airfare, mileage, lodging, and meals. Assuming that travel for distant interviews will be minimal, we estimate that expenses will be in the \$3,000-\$3,500 range.

Next Steps

We are prepared to come to Riviera Beach to make an in-person presentation, at no obligation to The City.

Sincerely,



George A. Brakeley III
Executive Chair
Brakeley Briscoe, Inc.
230 New Canaan Ave., #20
Norwalk, CT 06850
203 912 3362 (cell)
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APPENDICES

Brakeley Briscoe Library Client List
Bio George A. Brakeley III
Bio Anne Culp Storch
Firm Description
Principles of Practice
Roster of Consultants

Brakeley Briscoe Library Client List

Abraham Lincoln Brigade Archives	New York, NY
Alameda County Law Library	Oakland, CA
Alameda County Library Foundation	Fremont, CA
Anne Arundel County Public Library Foundation, Inc.	Annapolis, MD
Columbus Metropolitan Library Foundation	Columbus, OH
Friends of the Hayward Public Library	Hayward, CA
Friends of the San Francisco Public Library	San Francisco, CA
Jamestown, Town of	Jamestown, RI
Los Angeles County Public Library	Downey, CA
Mark Twain Library	Redding, CT
Marshfield, City of	Marshfield, WI
Oakland Library Foundation	Oakland, CA
San Mateo Public Library Foundation	San Mateo, CA
Westport Public Library	Westport, CT

George A. Brakeley III

Executive Chair

George A. Brakeley III joined what is now Brakeley Briscoe Inc. in 1969 after four years in sales and marketing with Humble Oil (now Exxon-Mobil).

During his 46 years in the profession, George has served more than 180 institutions and organizations in the United States in campaign management and strategic consulting as well as organizational development and capacity-building. He has counseled campaigns with goals ranging from \$750,000 to \$700 million, including 17 campaigns with goals of \$100 million or more. His current and recent clients include the Leukemia & Lymphoma Society (NY), American University of Armenia, the Cleveland Zoological Society, Christopher Newport University (VA), Endicott College (MA), Cone Health Foundation (NC), the Finger Lakes Museum (NY), Norwalk Community College (CT), National Centers for Disease Control Foundation (GA), York College (CUNY - the City University of New York), and the Rochester Institute of Technology (NY). He is a past chairman of the American Association of Fund Raising Counsel (now The Giving Institute).

George is a graduate of St. Andrew's School, Princeton University (A. B. in History), and the University of Connecticut (M.B.A.). He served as a Captain for four years in the U.S. Marine Corps (Artillery) and won a bronze medal in the 1,500-meter freestyle (swimming) in the 1964 Military Olympics, in Barcelona, Spain.

A practicing volunteer, he is in his 30th year as secretary of his Princeton class, of which he was president from 1976 to 1986, and is a Trustee of Staying Put in New Canaan, a services-for-seniors organization in his long-time home town. At Princeton he has served two terms on the Alumni Council Executive Committee and as a member of the Advisory Council of the Department of History and the Annual Giving Committee. He recently received the Princeton Alumni Council Award for Service to Princeton. He is a former Trustee of the University of Connecticut Foundation as well as the Congregational Church, Community YMCA and United Way, all of New Canaan, CT.

A widower, George resides in Norwalk, CT, after 46 years in nearby New Canaan. He is an avid rackets player and downhill skier. His daughter Kristin, a Miami University graduate, resides in Pittsburgh, PA with her family, while son Bill, who spent four years as a pitcher in the Milwaukee Brewers farm system, resides in Connecticut. George is a member of the New Canaan Field Club.

Anne Culp Storch
Senior Consulting Associate

Anne Culp Storch has 21 years of demonstrated success in solicitation, cultivation, campaign organization, staff and volunteer management. Key areas of expertise include campaign management, recruiting, training and motivating volunteers, cultivation and relationship building, coordinating and implementing fundraising events and preparation for major donors.

Anne has served as director of advancement at St. Edwards School in Vero Beach, Florida. Prior to that, she spent 15 years at George School in Newtown, PA, first as major gifts officer and the last five as director of development.

She has managed two capital campaigns at George School and a campaign to retire \$10 million in debt at St. Edwards School. During her 15 years at George School (of which she is an alumna), Anne was responsible for closing a \$128.5 million gift, the largest single gift yet given to an independent school.

Her consulting clients include Westtown School (West Chester, PA), Chandler Hall (Newtown, PA), and Alzheimers/Parkinson Association (Vero Beach, FL).

Her long and varied career has also included consulting within the restaurant business, experience as a social worker within several hospitals, and work as assistant director of Admission and College Counselor at Ursuline College and Rosemont College, respectively. She has also served on various boards and committees in Pennsylvania and has authored numerous publications.

Anne received her B.S. in Psychology from Ursinus College and her Master's in Education from Villanova University. She has been a board member of Mercer Street Friends in Trenton, NJ and Chandler Hall in Newtown, PA.

Brakeley Briscoe Firm Description

Background

Brakeley Briscoe's predecessor company Brakeley (also called Brakeley John Price Jones) was established in 1919. Through the years we have served the nation's most important institutions of higher education, arts, environment, and public service including World War II campaigns for the American Red Cross and Depression era campaigns for the WPA. Our archives are preserved at Indiana University's Center on Philanthropy to support research into the growth and development of the fundraising profession. We have a long and highly developed perspective on fundraising strategies and dynamics. We have grown today to serve clients globally in education, arts and cultural, health, religious, environmental, social and humanitarian sectors.

We have advised some of America's and the world's leading nonprofits including Boston Symphony Orchestra, Earthjustice (San Francisco, CA), Centers for Disease Control Foundation (Atlanta, GA), Massachusetts Eye and Ear (Boston, MA), Harvard University (Cambridge, MA), American Red Cross Bay Area (San Francisco, CA), and Hole in the Wall Gang Camp (New Haven, CT). We have also counseled smaller organizations such as Indian Mountain School (Lakeville, CT), North East Community Center (Millerton, NY), Habitat for Humanity of NW Connecticut (Salisbury, CT), American Institute for Economic Research (Great Barrington, MA), Norman Rockwell Museum (Stockbridge, MA), and Darrow School (New Lebanon, NY).

We are noted for our innovative techniques in capacity building, encouraging clients to stretch their goals, and to ask for larger gifts and to foster institutional leadership—some of the hallmarks of the Brakeley Briscoe method. Experience has shown that fundraising approaches Brakeley Briscoe developed and tested work successfully for clients worldwide when adapted with care and sensitivity to other cultural environments.

Today, Brakeley Briscoe has emerged as more than just another fundraising consulting firm. A team of senior executives applies a practical approach to each client's needs. We are distinguished by a tradition of caring, sound reasoning, creativity and range of experience.

Locations

Brakeley Briscoe has offices in Massachusetts, Connecticut, Florida, Metro DC, Texas, and California as well as affiliates abroad.

Services

The services Brakeley Briscoe provides are based on the belief that any assignment begins with an understanding of the mission and vision of each client's organization and the philanthropic environment of its constituents. Regardless of organizational size, the same quality of service is assured. Our goal is to promote our clients' objectives and services in a manner that includes and motivates every individual involved in raising and donating funds.

Major Gift Fundraising
Capital Campaign Planning & Management
Audits, Feasibility & Planning Studies
Training & Executive Coaching
Strategic Planning
Communication Strategies
Information Technology

Prospect Research Services
International Fundraising
Annual Campaigns & Planned Giving
Advancement Abroad
Board Development & Governance
Constituency & Public Relations

Principles of Professional Practice

- Brakeley Briscoe's first priority is to serve the best interests of each client.
- We will serve only those clients whose missions and objectives we share and find credible and are willing to be open about their needs and finances.
- We will candidly assess each client's unique fundraising potential and make no claims or promises of results unwarranted by facts and informed judgments.
- We will serve clients with enthusiasm and energy, making every proper effort to advance their causes and attain their goals, maintaining confidences and avoiding conflicts of interest.
- Our goal is to complete each assignment, resulting in full client satisfaction with the immediate benefits, and to prepare the client to secure increased philanthropic support over the years ahead.
- Our professional staff is committed to sharing its knowledge and experience with the client's volunteer and staff leadership.
- Our staff takes an active role in advancing philanthropy through the field of fundraising by teaching, writing, and speaking at conferences, participating in professional organizations and serving nonprofit institutions in a voluntary capacity.
- We will faithfully follow the law regulating fundraising practices in each regional and national jurisdiction where we serve throughout the world. We also adhere to the codes of ethics generally accepted within the fundraising profession.
- Our corporate and professional reward will be the satisfaction of achieving defined objectives on behalf of clients.
- Our fees are always pre-arranged; never commissions or percentages of contributions raised, and fairly compensate Brakeley Briscoe for the effort expended and expertise utilized.

BRAKELEY BRISCOE INC. ROSTER OF CONSULTANTS

George A. Brakeley III, Executive Chair
Marianne G. Briscoe, Ph.D., ACFRE, President
Alden F. Briscoe, MAT, Executive Vice President

Associate Managing Directors

Katherine M. Bella, CFRE
Juliana M. Ver Steeg, CFRE

Senior Consulting Associates

Michael J. Brennan
Patricia O. Bjorhvide, CFRE
Peter A. Caputo, CFRE
Janet S. Curtis, CFRE
Virgil E. Ecton

Julie Holt, CFRE
Karen S. Recht
Susan F. Rice, ACFRE
Thomas E. Ryan
Gordon D. Soenksen

Scott C. Staub, ACFRE
Anne C. Storch
John H. Taylor
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