

Actionable Insights Data-Driven Solutions Real Transformation



Empower Philanthropy

About BWF

BWF, a global philanthropy company headquartered in Minneapolis, MN, was founded in 1983 (at the time as Bentz, Whaley, Flessner). Today, BWF® has team members working remotely across the United States, successfully partnering with more than 200 clients a year, including numerous nonprofits on the Philanthropy 400, the top children's hospitals and international aid organizations, colleges and universities among the top 25 liberal arts institutions, and many other nonprofits that raise between \$1 million and \$5 billion+ annually.

Since 1983, BWF has provided full-service counsel to healthcare systems and academic medical centers, colleges and universities, arts and cultural organizations, and many other nonprofits. We help build strong fundraising programs and execute successful campaigns for clients across the continent and around the world.

As a comprehensive firm, we offer the breadth of services and expertise that fundraising professionals are looking for, including feasibility/campaign planning studies and internal assessments, prospecting and analytics, training and education, systems and information services, campaign counsel, annual giving, digital engagement, strategic communications, development operations and information services, and ongoing counsel.

BWF helps nonprofits build capacity and raise more money to further their missions.



Firm Values

Advance

BWF is a mission-driven organization that is committed to advancing nonprofit members and being generous citizens.

SECTOR EMPATHY. Our work is driven by a desire to make things better for our clients and the nonprofit fundraising community.

SERVICE DIVERSIFICATION. We strive to meet the complete needs of fundraising organizations in terms of counsel, service, data, and technology.

METHODOLOGY. We study how we can most effectively diagnose, advise, solve, support, change manage, and come alongside our client partners.

COMMUNITY. We are part of the ecosystem of fundraising. We build bridges with other service providers, we learn about current issues in our marketplace, and we share our knowledge to advance our community.

Discover

We are dedicated to finding “actually,” using methodology, and collaborating with our partners to deliver the BWF way.

COLLABORATIVE INNOVATION. We discover the new by intersecting perspectives—firm member experience, client perspective, industry developments.

CONTINUOUS ENHANCEMENT. Innovation is never finished. We pursue what's next whether that is tweaking a current solution or creating a whole new space.

THOUGHT LEADERSHIP. We regularly communicate new innovation by highlighting the collaborative process and industry focus of our firm.

BRAND PROMISE. We are known as the firm on the cutting edge—not satisfied to conform clients to an orthodoxy, but to propel them to what is next.

Thrive

Our firm works daily to be the best place to work and build a culture that encompasses inclusiveness and character-first individuals.

WE SEE OUR WORK HAS MEANING. When our clients are better than they were before. When the industry sees a sense of promise because of our work with them.

WE SEE WE ALL HAVE VALUE. Organization structure and roles are necessary for effective companies. Regardless of role and also regardless of tenure, race, gender, identity, ability, or life circumstances, each person has value and is treasured by the company. The company is all of us.

WE MEET OUR GOALS. Doing what we said we were going to do. And encouraging each other to succeed.

WE CELEBRATE. When one of us succeeds, we all succeed. When we put each other's needs ahead of our own. When we do that extra thing to make BWF better. We have much to celebrate!

We're Proud of Our History

BWF Historical Perspective

BWF has a strong history of innovation and impact. Through results-based methodology with a focus on organizational growth, BWF has helped thousands of organizations raise more money to further their missions.

The impact we make today is thanks to years of growth, team building, strategic planning, service advancement, and pushing the envelope. We are grateful that our three founders—Bruce Flessner, Frank Bentz, and John Whaley—took action on their vision in 1983 to make the world a better place and serve nonprofits.

There are more milestones than we can count that make us who we are today. Here are just a few to help you understand our roots:

1983

In the very first year of its founding, BWF received a phone call from a friend who was consulting for Chrysler Corporation. The message was, "A gentleman is doing this campaign in New York...would you go out and see whether or not it's going to succeed?" The gentleman was Lee Iacocca, and the campaign was for the now-legendary **STATUE OF LIBERTY/ELLIS ISLAND** restoration project. BWF stepped in and helped raise over \$315 million, far surpassing the original \$200 million goal. Ellis Island was restored to its rightful place in America's landscape.

With the founding pillars of innovation and industry thought leadership, this became the first of hundreds of projects that established BWF as a global leader in fundraising counsel, with groundbreaking and creative strategies to help institutions transform philanthropy.



The American Prospect Research Association, Apra, was founded in Minnesota, and BWF's own Bobbie Strand was a founding member. Bobbie was also responsible for writing the first-ever book on prospect research, "**PROSPECT RESEARCH: A HOW TO GUIDE.**" Bobbie, a partner with BWF from 1984-2008, is a nationally recognized leader in major gift and prospect development, capital campaign planning and implementation, major gift management, cultivation, and solicitation strategy development.



1987

BWF develops Prospect Select, an electronic prospect selection tool that was one of the first wealth screening tools in fundraising.

1995

BWF's 1st billion-dollar campaign is launched by the University of Michigan with the firm's support.

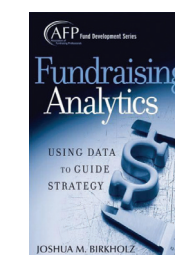
2000

Josh Birkholz joined BWF and launched the first **ANALYTICS CONSULTING PRACTICE IN FUNDRAISING,** establishing data science at more than 100 institutions.

2004

2006

Josh Birkholz authored "**FUNDRAISING ANALYTICS: USING DATA TO GUIDE STRATEGY,**" the seminal book on fundraising analytics.



BWF established its expertise in supporting fundraising operations by launching the **DonorCast division,** which focused specifically on advancing prospect research, analytics, and digital strategy for nonprofits.

2005



BWF's 10th billion-dollar campaign, UC Berkeley's, with \$3.13 billion raised

2008

\$4B

BWF served as counsel to the largest public university campaign at the time when the University of Michigan publicly launched its \$4 BILLION campaign, ultimately raising over \$5 billion.



BWF partnered with Florida State University on the FIRST UNIVERSITY GIVING DAY, the "Great Give," a year before Giving Tuesday was launched. That same year, BWF provided counsel for UCLA HEALTH SCIENCE'S \$2 BILLION CAMPAIGN, the largest at a public academic health center.

2013

2012

2016

Katrina Klapproth and Mark Marshall join the BWF principal team.

With BWF serving as campaign counsel, Colby College went public with its \$750 million campaign, the LARGEST LIBERAL ARTS COLLEGE CAMPAIGN at the time.



Boston Children's Hospital Trust completes its \$1.5 billion Dream Dare Deliver campaign, THE FIRST CAMPAIGN OF A BILLION DOLLARS AT A CHILDREN'S HOSPITAL.

2017

BWF acquired Groundwork Digital, the pioneering innovator of high-touch digital communications for transformational giving. This acquisition laid the foundation for {{firstname}}, the first of its kind partnership in the nonprofit sector between BWF and Hubbub.

Jan 2019

March 2019

Sept 2019

2019

BWF partnered with the University of Sydney Australia, which announced it had reached its \$1 billion philanthropic goal following its INSPIRED campaign. This achievement marked the FIRST BILLION-DOLLAR CAMPAIGN LAUNCHED IN AUSTRALIA, and at the time, the most successful campaign of any university in the nation.

Josh Birkholz steps into new role as the firm's CEO. Bruce Flessner, company founder and principal, stepped down from his role as principal after 36 years of service.



The firm officially announced its rebranded identity as BWF. This shortened brand name reflects an appreciation and respect for the firm's founding while also representing the ambitious vision for the future. BWF moves forward as an organization of expanding services, growing diversity, and depth of expertise, TOGETHER UNITED UNDER ONE IDENTITY TO EMPOWER EACH CLIENT AND MISSION.

{{firstname}} launched, focusing on advancing enterprise-wide nonprofit giving days, connecting donors and gift officers through personalized video marketing via its Digital Development Officer programs, and increasing participation through modern, video-driven Student Engagement Teams.



Jan 2020

Feb 2021

salesforce

BWF joins Salesforce.org partner program as an official partner.

March 2021

What's next?
Follow along to see our growth journey and partner impact.

FIRM LEADERSHIP



Josh Birkholz

Josh's consulting work has put him at the forefront of working with leading nonprofits, universities, and healthcare centers around the globe, making him a leader in big philanthropy.

fundamentals, they are focusing on making major changes to their programs, using BWF to reimagine the campaign, build new data science integrations, develop multi-platform digital enterprises, and push the edges of philanthropy.

Success gets measured in myriad ways today. Josh and his colleagues are proud of their contributions to clients' achievements, including tripling the annual giving run rate for a client by building a program of diverse funding streams guided by service-oriented technology, developing an ultra-high-net-worth strategy for an organization previously dependent on broad-based marketing resulting in transformational growth, and instilling confidence in fundraising leadership to forever change the trajectory of their program.

Josh serves the industry he is so passionate about in other ways too. He is the chair of both the Giving USA Foundation and the Advisory Council on Methodology for Giving USA and is an instructor at the Rice University Center for Philanthropy and Nonprofit Leadership. He was awarded both the Crystal Apple Award for Teaching Excellence from CASE and the prestigious Apra Visionary Award for his contributions to prospect development.

As CEO of BWF, Josh continues to serve clients and inspire the firm to innovate and move the industry forward. For him, reaching philanthropy's next frontier means seeing the edges of our present state of knowledge, policy, and procedures while borrowing from other industries to make meaningful changes and predict what has yet to be developed.

FOR JOSH BIRKHOLZ, enabling philanthropy is among the noblest of pursuits, divining philanthropy's next frontier the most exhilarating.

In his 25-year career, Josh has redefined modern fundraising program design, fundraising in a smart economy, and branding in the high-net-worth marketplace.

His consulting work has put him at the forefront of working with leading nonprofits, universities, and healthcare centers around the globe, making him a leader in big philanthropy.

An innovator in the business of philanthropy, Josh literally wrote the book on fundraising analytics. His book "Fundraising Analytics: Using Data to Guide Strategy" lays out how to turn a nonprofit's organizational donor data into actionable knowledge. His latest book, "BeneFactors: Why Some Fundraising Professionals Always Succeed," explores eight factors for mastering fundraising in this innovative era of philanthropy. Josh has also contributed to other books, including "Return on Character: The Real Reason Leaders and Their Companies Win."

In fundraising's early days, much of a consultant's work involved helping leaders do things for the first time: run their first campaign, ask for their first principal gifts, or build relationships with board members. Today, as fundraising leaders have deepened their knowledge and become more skilled in the

KATRINA KLAPROTH IS ALL ABOUT making a difference—in her work and in the world.

During her two decades in the fundraising field, she's come to be seen as a recognized expert in donor management systems, organizational structures, integrated and direct fundraising, and donor relations.

Clients in both the public and private sector—whether in the higher education, healthcare, software, government, or financial industry—know she's adept at designing programs to effectively capture personal interest in products and services critical to achieving an organization's business objectives.

Bringing to bear deep insights gained from vast experience and her ability to provide steady guidance, clients have achieved their goals and met—even exceeded—their own expectations. Katrina has spearheaded countless multi-year systems selections and implementations at both large medical centers and higher education institutions. She's helped clients develop an automation strategy for gift processing that impacts staff and donors,

brought fresh thinking to how to prepare and organize advancement services for campaigns, and recommended patient data management efficiencies to support grateful patient strategies and fundraising. Katrina's singular focus on driving results for her clients is what makes her—and ultimately, her clients—successful.

In 2016, Katrina joined the BWF principal team as a firm owner and today is chief operating officer and president of philanthropic services. Drawing upon the same operational expertise she skillfully provides her clients, Katrina has "revolutionized" BWF's operating model and helped the firm double in less than five years while also driving the effort to establish critical vendor partnerships for the firm.

Working in a field she's passionate about means Katrina can't imagine doing anything else.

Katrina Klapproth



Bringing to bear deep insights gained from vast experience and her ability to provide steady guidance, Katrina's clients have achieved their goals and met—even exceeded—their own expectations.

FIRM LEADERSHIP

In his three decades of fundraising, Mark has come to be known for his organizational capacity building and his ability to challenge organizations and their boards to raise their most significant gifts.



Mark Marshall

MARK MARSHALL'S PERSONAL MISSION is to help philanthropic organizations fulfill theirs.

Being able to help both donors see the impact they can make in the world and organizations to inspire donors to act is how he works to make the world a "better, kinder, more just place."

Mark knows he's not going to cure cancer, but he may be able to help educate the physician or scientist who will or help them secure the funding for their work. He sees colleges and universities as launch pads for our children, and so helping these academic institutions strengthen the experiences they offer, create access, and build excellence means impacting our world in profound ways. Clients and their donors' passions for cures, spaces, knowledge, the well-being of others, and experiences are infectious, and being even a small part of that success is intoxicating.

Mark has helped countless organizations achieve such success. At one particular institution that had long made decisions on the fly, he helped them develop a strategic plan specifically for the development office that had a series of tactics designed to build a culture of philanthropy, meet short-term financial goals, and build long-term capacity. And for organizations planning to mount campaigns, he sees campaign planning as one of the most important things anyone will do in the world of fundraising. Given that the planning process should shape the next five to eight years of an organization's fundraising efforts (not to mention the professional life of those leading such efforts), Mark sees the

BWF team's role as helping to challenge and/or affirm a fundraising team's assumptions, explore new opportunities, and create a hyper focus on outcomes. Mark is proud of the fact that every campaign BWF has been a part of has created the largest gift ever and/or been the largest campaign ever.

In his three decades in fundraising—some of it spent on the front line as a fundraiser at a Big 10 university's medical foundation, a law school, and a parochial school—he's come to be known for his organizational capacity building and his ability to challenge organizations and their boards to raise their most significant gifts. Mark has developed particular expertise in capital campaigns, major and planned giving, annual giving, and building a comprehensive development program. **Many of his projects have culminated in his witnessing organizations achieve transformational growth by figuring out how best to reach their full potential,** push their limits in a sustainable manner, and create a bold vision that inspires others. It's meaningful work.

Now as principal and president of philanthropic counsel at BWF, Mark leads a consulting team laser focused on impacting our clients' missions.

350+
CAMPAIGNS

BUILT
500+
PREDICTIVE MODELS

SUPPORTED at the
60+ \$1B
CAMPAIGNS level

IMPLEMENTED **100+** GIVING DAYS

CONDUCTED
150+
TRAININGS

RECEIVED **5/5** Salesforce
Satisfaction
Rating

ADVISED
25+
SYSTEMS SELECTIONS



RAISING MORE TOGETHER

BWF TODAY



100

**PREDICTIVE
MODELS
BUILT A YEAR**



**PROJECTS
PER YEAR**

300+



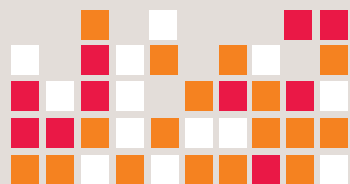
200+
**CLIENTS
PER YEAR**



CAMPAIGNS UNDER MANAGEMENT

\$20,000,000,000+

40
**SURVEYS
PER YEAR**



TEAM SIZE

70

**team
members
and
growing!**



Survey

Customer Satisfaction Survey

1. Please tick a box on each line to indicate how much you rate level of service

Excellent Good Average Poor Very Poor

a. Location

b. Comfort

c. Facilities

d. Staff

e. Value for money

What can we do to improve service?

Submit

Terms of Use Privacy Policy Copyright Contact



4
**CLIENTS ON
CONTINENTS**



Services & Expertise

Who We Serve

We are your trusted partner across all philanthropic sectors, providing both consulting and services. Our global perspective and practical knowledge means we provide cross-sector strategic and tactical solutions that advance our clients' fundraising abilities.

BWF is committed to helping you build long-term capacity to achieve your goals.



HEALTH



ENVIRONMENT & ANIMALS



FAITH-BASED



EDUCATION



PUBLIC & HUMAN SERVICES



ARTS & CULTURE



"BWF helped us adopt and integrate a much more comprehensive strategy in an area that is relatively new to arts organizations—the digital space."

DR. NATALIE CHANG
*DMA, Director of Donor Engagement-Individual Giving
Sarasota Orchestra*

"Working with BWF meant that we were able to implement Microsoft Power BI to provide real-time dashboards and data visualization tools to help monitor progress and areas for improvement related to our organizational goals. BWF's expertise allowed us to significantly accelerate the timing of the implementation of our business intelligence efforts, making sure they will be impactful during this comprehensive campaign and beyond."

ARIAN BUNDE
*Vice President for Strategy and Innovation
South Dakota State University Foundation*

"Our collaboration with BWF meant that the University of Queensland is now a leader in gift management and stewardship in Australia. Ultimately, this project helped us provide a more positive end-to-end donor experience and to ensure philanthropic gifts achieve their maximum impact."

JENNIFER KARLSON
*Pro-Vice-Chancellor of Advancement
University of Queensland*

"This effort was successful because BWF took the time to understand our needs and current situation and where we want to go. We were backed up by an experienced team in all phases of development."

BRENT DUNN
*Vice President for Advancement and CEO
Missouri State University Foundation*

TRANSFORMATIVE IMPACT

Here are a few client partner stories on the impact BWF made on their fundraising efforts.

"BWF brought both passion and insight to the project to develop an ensemble of communications pieces that provided a sound framework for ASI's important initiative to reach our donor community about a transformational campaign. The campaign case, which is resonating with our widely diverse audience in communicating the many facets of ASI that are connection points for donors, is helping inspire their generosity toward our multimillion-dollar goal."

BRUCE KARSTADT
President and CEO, American Swedish Institute

"Because this effort applied industry data and our historical performance, we received the information to make data-driven decisions."

KATIE MACRINA
*Managing Director, Prospect Management and Research
Massachusetts General Hospital*

"Our collaboration with BWF meant that we were able to successfully select, implement, and launch a new CRM with ease and confidence."

STACI GLASER
*Director of Development Operations
National FFA Foundation*

"BWF helped us define our vision and build an analytics culture while focusing on process, sustainability, and impact."

CHARLENE HARNER
Director, Development Services, University Hospitals

"It isn't enough for a consultant to come to campus to 'impart knowledge.' The consultant has to listen to the unique needs of the client and tailor counsel to address the individual challenges that are present. We have that with BWF and appreciate the value they bring to our efforts to conduct a successful capital campaign."

BOB PIERCE
*Vice President for Advancement
University of Alabama*

"Collaborating with BWF meant being able to strategically review our ideas and goals for future years, allowing us to create a fulsome and comprehensive plan to guide us through crucial projects and growth. This effort was successful because BWF provided us with guidance, insight, and best practices and supported us in creating, implementing, and launching a new strategic plan that will help inform our fundraising, communications, and marketing work for years to come."

TRACY BROWN
*Director, Development
Covenant House Vancouver*

Commitment to Supporting Our Industry

BWF proudly sponsors the following associations and professional organizations:



[CHAPTERS ■ AFP MA ■ AFP DC ■ AFP MN ■ Apra DC ■ Apra NW]

Certifications

We are committed to maintaining current certifications to better serve you:

- Accreditation in Public Relations
- Blackbaud® Certified
- Certified in Change Management
- Certified Public Relations Counselor
- Dynamics 365 Fundamentals (CRM) from Microsoft
- Project Management Professional (PMP) from Project Management Institute
- Salesforce Certified Administrator
- Salesforce Certified Administrator (SCA) from Salesforce
- Salesforce Education Cloud Consultant
- Salesforce Nonprofit Cloud Consultant
- Salesforce Sales Cloud Consultant



How We Help

BWF provides expertise in every facet of philanthropy.



- Campaign Planning
- Internal Readiness
- Strategic Planning
- Workforce Planning & Talent Management
- Leadership Development
- Staffing
- Strategic Campaign Communications



- CRM Analysis & Conversion
- Prospect Development
- Business Intelligence & Reporting
- Business Process Optimization
- Data Science & Analytics



- Frontline Giving
- Dynamic Constituency Programs
- Building the Base
- Digital Marketing & Fundraising
- Marketing & Communications
- Corporate Foundation Relations & Grant Writing
- Donor Engagement



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