



Fund Raising, Friend - raising, Results

FUNDRAISING SERVICES

Overview

- **Fundraising Services**

PDA gets results. Through major gifts, events, capital campaigns and mass appeals, we have helped hundreds of organizations achieve their dreams.

- **Organizational Development**

From managing your database to helping craft your long-term strategy, PDA provides the tools you need to succeed.

- **Services for Foundations and Corporations**

PDA offers expert guidance and support to help you maximize the good you do.

- **Marketing**

Through custom research, we have gained a unique understanding of diverse segments within the Jewish community. We leverage this knowledge to help you identify your target market and communicate your message most effectively.

- **Fundraising Tools**

PDA's expert writers and designers create print and on-line materials that reflect a keen understanding of how donors make decisions.

Major Gifts

From prospect research to grant applications and solicitation training, PDA's expertise is key in ensuring your bottom line success.

Prospect Research

Using the latest on-line tools and our own extensive database, PDA combs millions of records to identify prospective donors - corporations, foundations, and individuals - whose interests and resources meet your needs.

Warming "Cold" Prospects

Networking works! PDA uses proven techniques to identify contacts who can solicit your new prospects successfully.

Foundation Submissions

Winning proposals are no accident. PDA crafts outstanding proposals and provides the tenacious follow-up that yields results.

Approaching Individual Donors

"People give to people," but they have to be the right people; PDA targets the right solicitors, trains them, and helps them get the meeting.

Solicitation

PDA is with you at the «ask,» helping to guide the conversation and overcome objections. We know what to ask for and how to turn a "no" into a "yes."

Events

Our experienced staff will spare no detail in ensuring your next event is memorable and successful.

Dinners

New York is a dinner town, and PDA knows how to make the most of this specialized fundraising tool. We do everything from databases to speeches. We take the load off your staff, so they can focus on ongoing development work.

Conferences

The difference between a spectacular conference and a mediocre conference lies in the hundreds of details that receive our care and attention.

Parlor Meetings

The right home, the right program, the right people: PDA brings these ingredients together to raise significant dollars for you.

Other Functions

Friend-raising is matched by fundraising at unique gatherings that showcase your organization and its achievements.

Capital Campaigns

From feasibility studies through design and implementation, PDA can manage every step of your capital campaign.

Feasibility Studies

Are you ready to embark on a major campaign? What do your board members, opinion leaders, and major donors really think of your plans? Who else is out there to support your cause? A feasibility study can tell you whether the combination of timing, resources, and people will come together to enable you to meet your goals.

Campaign Design

PDA will guide you through the steps that set the tone and direction of your campaign. We will create a viable strategy and lay out a reasonable timetable. After considering the array of prospects, we will create giving trees, case statements, and naming opportunities.

Campaign Implementation

We will help you make your case (with scripts, brochures, and proposals) and find your pace-setters. We will rate prospects, organize solicitations, and help you launch and run the campaign.

Mass Appeals

Get the word out! We will publicize your organization to help attract new donors.

Acquiring and Retaining Donors

Successful mass appeals are able to attract new donors and retain current contributors. Working with list managers, PDA focuses on increasing the pool of contributors and the size of their gifts.

Direct Mail Campaigns

A winning direct mail campaign yields significant income and takes your message public. PDA carefully crafts direct mail pieces that are designed to be opened, read, and returned. We handle all the details, from choice of lists, exchanges, and rentals to copywriting, design, printing, and mailing.

ORGANIZATIONAL DEVELOPMENT

Guiding Organizations

PDA keeps an eye on the big picture while helping you grow in the short-term.

Strategic Planning

PDA works with your board, donors, and key opinion leaders to develop an ambitious, yet sensible, game plan, spelling out where you're going and determining the best way to get there

Board Development

Your board is your most important asset. PDA is adept at galvanizing current board members and recruiting new ones.

Training Services

Development professionals, at every level, can benefit from coaching and mentoring by experienced industry leaders. PDA provides expert training based on its many years of fundraising experience.

Prospect Research

Using the latest on-line tools and our own extensive database, PDA searches millions of records and identifies prospective donors - corporations, foundations, and individuals - whose interests and resources meet your needs.

Marketing Materials

PDA can help you get your message across by crafting the right materials to suit your mission; brochures, newsletters, e-philanthropy, and more.

Housing Organizations

When you make our office your home, you can benefit from cost efficiency as well as our expert management and hands-on development.

HQ Style Office Space

You may be able to save more than one third of your operating costs by locating your organization at PDA. Whether we house your staff or provide staff services, PDA will provide first-class executive office space to suit your needs: conference facilities, private office, production services, and more.

Strategic Guidance

Organizations that “live” at PDA get both day-to-day and long-term guidance - answers to “what do we do now?” and where do we go from here?”. See “Guiding Organizations” for more.

Administrative Support

Our expert and caring administrative staff becomes yours, when you are housed at PDA. They’ll give you all the support you need to get the job done.

Financial Records

Every detail counts when it comes to keeping proper financial records. Our operations staff makes sure that every dollar - whether coming in or going out - is properly tracked and recorded.

Database Management

We know how crucial your relationships are with your donors. We sweat the details to track every interaction and contribution promptly and accurately.

Fulfillment Services

Every donor needs to be thanked, whatever the size of the gift. PDA sends out many thousands of thank-you notes, follow-up letters, and premiums annually, enhancing your stewardship initiatives.

Hands-On Training

If you choose to house your staff at PDA, we can provide training, supervision, and oversight - especially useful for new professionals with limited background or training.

FOUNDATIONS & CORPORATIONS

Foundation Services

Foundations benefit from PDA's extensive knowledge of the non-profit world, as well as its excellent organizational and administrative skills.

Advisory Services

Donors need strategies to set goals for themselves and their grantees. PDA helps foundation trustees and professionals make the most of their philanthropic dollars and create a legacy of successful projects and programs.

Administrative Support

PDA supports foundations by providing essential back-office services, including payroll administration, financial recordkeeping and tracking of grants, and grantee reporting.

Corporate Services

PDA helps corporations set philanthropic goals and communicate their achievements to their target audience.

Cause-Related Marketing

Corporations can do well by doing good. PDA analyzes corporate objectives and helps C-level executives establish a philanthropic agenda that can also bolster the bottom line.

Reaching Target Audiences

When corporate philanthropy makes a difference in society, that "news" must reach the right audience. PDA helps companies identify and reach their target markets with a message that's loud and clear.

MARKETING

Custom Research

PDA can design surveys and segment niche markets to help you focus your efforts.

Surveys

PDA can put its experience to work for you in specified markets, designing surveys to gathering the information you need to target your message effectively.

Segmentation & Targeting

Different messages resonate with different people. PDA helps clients connect with disparate sub-groups and gain their loyalty.

Communication Vehicles

Get your message across clearly and effectively, in any medium.

Concept Design

Words matter. No matter how unique your product or service, you need effective marketing concepts to break through the clutter. Memorable copy can make the difference between mediocrity and excellence.

On-line Marketing

The Internet attracts attention and achieves results. PDA can design an effective on-line marketing campaign for your product or service.

FUNDRAISING TOOLS

Print Materials

PDA's writers produce print materials that win grants and enhance your success. We write brochures, case statements, slide presentations, and much more. We work with expert designers, creating material that impresses your target audience and makes your supporters proud of their association with your organization.

We can also help you craft or re-launch your corporate identity, from logos, business cards and stationery to brochures and direct mailings. Our designers ensure that your image is consistent across all media, whether they be print or online.

Web Design

PDA's online division is uniquely positioned to provide your organization with powerful fundraising and PR tools. PDA offers eye-catching custom websites that feature easy-to-use content management systems, online donation capabilities and high-ranking search placement.

Maximize the effectiveness of this cost-effective medium and ensure your organization has the strong online presence that is so vital in today's Internet and multimedia-driven world.

E-Philanthropy

E-Philanthropy is an efficient and effective way to target new donors and stay top-of-mind with your current donor-base.

E-Newsletters

We design striking E-newsletters that will keep your members involved and looking forward to the next issue. Our customized content management tool enables you to update future issues independently, using basic word processing skills.

Each E-newsletter can include a donations button that prompts donors to keep giving, as well as a link to your website to help keep readers informed and involved. Our content management tool also offers an automatic archiving feature, which allows you to save previous issues of your E-newsletter to your website with the click of a button upon the publication of each new E-newsletter issue.

Targeted E-Mail

Targeted e-mail is one of the most cost-effective means of broadening your organization's reach. The content is designed to be so captivating and interesting that its recipients feel compelled to share it with their friends. Additionally, these messages can be sent to your current members as well as purchased direct e-mailing lists. We comply with all privacy and anti-spam laws.

Targeted e-mails can contain a holiday card, a short interactive movie or a gripping story that, when passed around, provides your organization with exposure to a new audience it could not have reached otherwise. Each new e-mail campaign is custom designed for your organization, to meet its unique needs.

ABOUT PDA

Overview

Founded in 1986, Perry Davis Associates, Inc. (PDA) is an international consulting firm that fosters the growth and development of institutions and communities through its work with:

- social service organizations
- public and private educational institutions
- community development corporations
- educational and outreach projects
- government agencies
- business and industry
- corporate and private donors
- cultural and environmental institutions
- colleges and universities
- marketing and membership organizations

Headquartered in New York City, PDA is also represented by staff associates in Israel.

How We Work

PDA is registered in New York State as a professional fundraiser and operates within all of the ethical and legal guidelines provided by New York State. PDA also functions in accordance with the Fair Practice Codes of the American Association of Fund-Raising Counsel and the Association of Fundraising Professionals. We serve clients on the basis of a flat monthly fee, agreed on in advance. Fees reflect projected time requirements, staff members assigned to the project, and duration of the project, plus expenses. As a matter of personal and corporate integrity, PDA never charges a percentage of monies raised. What we raise for you is yours and yours alone.

Who We Are

Perry Davis, President of Perry Davis Associates, (perry@perrydavis.com) has served in key positions in government, education, and the private sector. As the New York City Partnership's Vice President for Economic Development, he directed the completion of the Partnership's strategic plan and its new project selection process, and developed its first program-related budget of \$8 million. Prior to joining the Partnership, Mr. Davis was the Director of Funded Programs, New York City Board of Education, where he raised \$350 million annually. Mr. Davis, who holds a doctorate in Government and Administration from Columbia University, has also served as an Assistant to the Mayor of New York City. He is the editor and a contributing author of a book on public-private partnerships published by the Academy of Political Science and has served as guest speaker at conferences sponsored by the White House, the International Downtown Association, and various corporations.

Margy-Ruth Davis, Executive Vice-President and co-founder of Perry Davis Associates, (mrdavis@perrydavis.com) formerly served as the Executive Director of the Institute for Jewish Experience and as Executive Director of the Greater New York Conference on Soviet Jewry. Ms. Davis was also Development Director at the Elaine Kaufman Cultural Center, where she established the Development Department, created an ongoing program of foundation support and corporate membership, and oversaw all aspects of board and donor relations.

Chava Reyna Casper, Senior Writer and Grant Coordinator, (chava@perrydavis.com) earned a BA in psycholinguistics from City College of CUNY and worked as an assistant to Dr. Margaret Mead. Following the completion of her MA and PhD in experimental psychology at Columbia University, she joined Lawrence Erlbaum Associates, an academic publishing house, as its Acquisitions Editor in Neuropsychology. Continuing to serve as an advisor in neuropsychology, she became LEA's Developmental Editor, honing her writing and organizational skills as she developed, critiqued, and rewrote manuscripts in all areas.

Ruth Karish-Friedman, National Director, Aleph Society (ruth@perrydavis.com) earned a bachelors degree in English and American literature from Manhattanville College and a juris doctorate from New York Law School. After 14 years as a litigation attorney in Manhattan, Ruth left her law partnership to embark upon a new career in nonprofit management. She most recently served as the acting executive director of the Volunteer Lawyers Network in Minneapolis, MN.

Chaim Davis, Account Executive, (cdavis@perrydavis.com) most recently worked as a Healthcare Analyst at the Garnet Group, a hedge fund in midtown Manhattan. Chaim received his bachelor's degree from Columbia University, and at PDA he specializes in researching individual donors and foundations. He has also recently launched the Revach Fund LP, a small lifesciences equity fund.

Sara Hasson, Senior Account Executive, (sara@perrydavis.com) earned a bachelor's degree in Architecture and Art History from Barnard College - Columbia University. In addition to serving as a research assistant for classical architect Allan Greenberg, she has extensive experience in the art and not-for-profit worlds, working at Metropolitan Museum of Art and subsequently as an appraisal coordinator in the Estate and Appraisals Department at Doyle New York Auctioneers and Appraisers.

Tova Levine, Assistant to the National Director, Aleph Society, (tova@perrydavis.com) earned a bachelor's degree in social work from Rutgers University and a master's degree in social work from Hunter College, with a specialty in Community Organizing and Planning. She has extensive experience in the not-for-profit community, including work at the Urban Justice Center and, most recently, as a development consultant for Art Start.

Allison Lyons, Account Executive, (allison@perrydavis.com) earned a bachelor's degree from Columbia University in Anthropology. After spending a year in Israel working in overseas fundraising for the Ma'ale Film School in Jerusalem, she returned to New York and earned master's degrees in clinical social work and Jewish studies from the Columbia University School of Social Work and the Jewish Theological Seminary.

Ebony Scott, Administrative Assistant, (ebony@perrydavis.com) worked in the Charities Department of the New York State Attorney General's office for four years as an Executive Assistant prior to joining the PDA team. Ebony also worked for two years as an Account Executive at Clover Leaf Memorial Park, where she was responsible for a total of \$105,000 in new sales. Ebony is currently working towards her bachelor's degree in Computer Science at Touro College.

OUR CLIENTS

Major Initiatives

Simon Wiesenthal Center

This renowned international center has hired PDA to supplement its fundraising efforts. After successfully coordinating a \$10 million dollar capital campaign for the recently-opened New York Tolerance Center, PDA has expanded its efforts, working to bring in new supporters such as foundations, including a large grant from the prestigious Ford Foundation; corporations, ranging from law firms to financial institutions; and private individuals from across the United States. PDA has also been asked to forge key strategic alliances between the New York Tolerance Center and area institutions, such as governmental agencies, universities and secondary schools, corporate diversity programs, and not-for-profit agencies

The City of Beer-Sheva

PDA guided the Beer-Sheva Foundation and worked closely with the city's Mayor and foundation representatives in Israel in all aspects of its work, including proposed development, major gifts, board development, and administration. PDA helped secure a grant of \$2 million for a new cultural center in the heart of the city.

Hal'a: The Rachel Nash Jerusalem Comprehensive Breast Clinic

PDA helped raise over \$2 million to launch and support this state-of-the-art facility, which provides comprehensive breast cancer screening and treatment.

New York City Board of Education

PDA worked closely with The New York City Board of Education, the nation's largest urban public school system, to improve its grant-seeking activities. Providing extensive consulting, training, and evaluation, PDA upgraded the Board's in-house development efforts.

Doctors Without Borders

This global volunteer medical relief organization (with over 400 doctors in 84 countries), the winner of the 1999 Nobel Peace Prize, retained PDA to strengthen its major-gifts fundraising activities and development of new sources of funding. PDA's focus involved the development of new proposals, corporate and foundation prospect research, fundraising for general support and special projects, and the training of development personnel.

Board Development

JTA: Global News Service for the Jewish People

The oldest and most respected worldwide Jewish news service, hired PDA to vastly expand their development operation. PDA has provided over 200 prospective foundation donors and worked directly with the professional staff and JTA's very prestigious board in solidifying contacts and greatly extending the private funding opportunities of this central agency. PDA worked on a JTA's most successful board fundraising campaign in late 2004 and has helped recruit new directors.

Israel Anti-Drug Abuse Foundation (IADAF)

PDA served as the administrative office for all American activities of IADAF, the only organization dedicated exclusively to promoting drug prevention and treatment services in Israel. PDA has helped IADAF expand the influence and effectiveness of its board through targeted fundraising, gala dinners, and missions to Israel.

Marketing

Israel Ministry of Tourism

PDA served as the Israel Ministry of Tourism's chief advisor for the North American Jewish community. Most notably, PDA developed, launched, and coordinated the Go Israel Tourism Campaign, a major initiative promoting Israel travel in more than 2,000 synagogues and groups across the United States and Canada. Garnering widespread coverage in the press and unprecedented support from all four major Jewish denominations, this campaign has been cited as a major factor contributing to the record number of North American Jews who visited Israel in 2003, 2004, and 2005. PDA also provided strategic planning, resource coordination, and material development services, advising the Ministry on its work with Jewish organizations; preparing briefings and other reports for government officials; designing tools such as advertisements and travel kits; and developing marketing techniques which the Ministry has replicated in other nations across the world.

Events

Jaffa Institute

PDA worked with Jaffa to launch, and then to implement, its New York bi-annual dinner. A recent dinner raised \$1.4 million.

Auschwitz Jewish Center Foundation (AJCF)

For the past 4 years, PDA has designed and coordinated the AJCF annual dinner. PDA developed this organization's strategic plan, then designed and coordinated its first annual dinner, honoring Senator Joseph I. Lieberman. The event, featuring the Honorable Stuart Eizenstat, exceeded projected goals for both monies raised and number of guests, and established AJCF as an important component in the New York philanthropic community.

Columbia University Kraft Student Center

PDA oversees the fundraising and planning efforts for Kraft's dinners. Working with the professional staff and lay leadership, PDA has been hired to oversee all planning for 4 major annual dinners, including site selection, solicitations, and dinner management. The events have honored, among others Arthur Ochs Sulzberger, Herman Wauk, Robert Kraft.

Koby Mandell Foundation

The Koby Mandell Foundation works with bereaved families who have lost a parent, child, or sibling to terror, operating a network of therapeutic camps and adult support groups across the state of Israel. PDA has been retained to coordinate the organization's 2006 gala dinner.

Meir Panim Relief Centers in Israel

PDA helped raise close to \$4 million for Meir Panim by coordinating "Children Singing for Children," a star-studded concert -- held at Avery Fisher Hall of New York City's famed Lincoln Center -- that featured children's choirs from across the New York region, as well as prominent performers. Meir Panim, which operates a network of 15 relief centers providing vital services to more than 278,000 individuals across Israel every day, has retained PDA to provide a full array of services, ranging from strategic planning to donor cultivation.

MESHI

The leading early childhood development center in the greater Jerusalem area, MESHI seeks to provide comprehensive early intervention for children with cerebral palsy, spina bifida, and other severe disabilities. PDA has proudly worked to enhance MESHI's presence in North America, in 2004 PDA helped MESHI hold its very successful inaugural dinner.

Administration

The Aleph Society

PDA launched this not-for-profit organization, which has educational and publishing projects on four continents. PDA helped create and continues to staff the Aleph Society's board, schedule national lecture tours, and initiate and run fundraising activities. PDA has raised over \$15 million for the Aleph Society's programs.

Israel Crisis Management Center - Selah

Starting with only 29 names on a mailing list just three years ago, PDA has aggressively pursued a direct mail strategy that has brought 27,000 donors to the organization.

Foundation Support

Nash Family Foundation

PDA provides general guidance, administrative support for the Foundation, and housing.

Jerusalem Foundation

PDA provided fundraising and logistical support for the Jerusalem Foundation's gala dinner and concert at Lincoln Center's Avery Fisher Hall. The event raised \$1.2 million.

Jewish Media Fund

PDA helped raise several million dollars for the Fund - a project of the Charles Revson Foundation - to produce Shalom Sesame, a 13-part video and television series co-produced by the Children's Television Workshop. PDA was instrumental in conceiving and funding the Russian-language version of the series.

Research

Council of Senior Centers and Services of New York (CSCS)

As a consultant to CSCS - the City's leading advocacy, technical assistance, and coordinating resource for 265 community-based senior centers serving 300,000 elderly residents - PDA developed and managed an expansion of BOSS, a system that uses a computerized questionnaire to help seniors obtain government benefits. With support from the Butler and Guttman Foundations and the New York Community Trust, it also undertook a major study of Adult Social Day Care in New York, a study now being used to formulate policies and generate funding alternatives statewide.

United Jewish Communities (formerly UJA and Council of Jewish Federations) - Washington Action Office

UJC represents 189 local Jewish federations, 400 independent communities, and 700,000 people across North America, whose annual contributions exceed \$2 billion. PDA researched and wrote a practical user guide on the Continuum of Care for the elderly, a major national issue.

Sesame Workshop

PDA has maintained a long-standing partnership with Sesame Workshop (formerly the Children's Television Workshop). Most recently, this leader in educational programming has retained PDA to produce a comprehensive strategic plan and provide an array of fundraising services in support of Rechov Sumsum, the Israeli version of Sesame Street.

Shalem Center

This prestigious Israeli think tank sought to launch a partnering American organization. PDA produced a comprehensive strategic plan and continues to provide consulting services.

Capital Campaigns

DOROT

PDA was asked to design a capital campaign for the \$6 million renovation of this Upper West Side institution serving senior citizens. The assignment included planning for foundation requests, board solicitations, board training, capital campaign written materials, and increasing gifts from previous donors.

The Moriah School

This New Jersey school retained PDA to organize and initiate a \$4 million capital campaign. PDA created a turn-key operation, training volunteers to take over the campaign after the research and preparatory phases had been completed.

Friends of Sheba Medical Center - Tel Hashomer

PDA helped undertake a \$23 million campaign to expand Israel's national newborn testing service. In this new initiative, Sheba will screen every baby born in Israel for metabolic and hematological conditions.

Simon Wiesenthal Center

This renowned international center has hired PDA to supplement its fundraising efforts. After successfully coordinating a \$10 million dollar capital campaign for the recently-opened New York Tolerance Center, PDA has expanded its efforts, working to bring in new supporters such as foundations, including a large grant from the prestigious Ford Foundation; corporations, ranging from law firms to financial institutions; and private individuals from across the United States. PDA has also been asked to forge key strategic alliances between the New York Tolerance Center and area institutions, such as governmental agencies, universities and secondary schools, corporate diversity programs, and not-for-profit agencies.

Family Support Services Unlimited, Inc.

PDA is undertaking a \$5 million capital campaign for this leading Bronx-based provider of foster care and family support services, enabling the organization to renovate and expand its service care center.

CAREERS AT PDA

Our Work Environment

At PDA, we strive to create a warm, collegial work environment, placing a high premium on collaboration, communication, and professionalism.

Our close-knit staff members adopt a team-based approach, working together to share information, pool resources, and grow professionally. We are more than a place to do good work; we seek also to be a good place to work.

Job Openings

Please check back frequently for more information.

CONTACT PDA

Contact PDA

Perry Davis Associates, Inc.
Suite 1405
25 W 45th Street
New York, NY 10036

Phone: 212-840-1166
Fax: 212-840-1514
Email: info@perrydavis.com