



CONSULTANTS' DIRECTORY

OVERVIEW OF SERVICES PROVIDED:

(Please see full listings below for more detailed information)

The Cagney Company: Annual Giving, Board Development and Governance Expertise, Capital/Endowment Campaigns, Development Planning, Grant Writing, Major Gifts, Planned Giving, Strategic Planning, Retreat Facilitation, Leadership Coaching and Training, International Philanthropy and Arts and Culture Specialists

The Phoenix Philanthropy Group: Fundraising and Campaign Management, Development, Operations, and Infrastructure; Prospect Development; Alumni and Constituent Relations; Strategic, Campaign, and Annual Planning; Interim Management; Volunteer Leadership Development, Management, and Training; Executive Coaching, Training, and Development; Evaluations

Synergy Philanthropy, LLC: Annual Giving, Board Development, Capital/Endowment Campaigns, Development Planning, Interim Management, Major Gifts, Planned Giving, Strategic Planning, Infrastructure and Capacity Building, Women Focused Donor Strategies, Retention and Return on Relationship Focused Practices, Case for Support Development

GivingSmith: Board Development, Capital/Endowment Campaigns, Development Planning, Major Gifts, Planned Giving, Charitable Gift Annuities, Donor Advised Funds, Starting A Legacy Society.



The Cagney Company

Annual Giving, Board Development, Capital/Endowment Campaigns, Development Planning, Grant Writing, Major Gifts, Planned Giving, Strategic Planning, Retreat Facilitation, Coaching and Training, International Philanthropy and Arts and Culture Specialists

Contact: Penelope Cagney, MFA, MA, CFRE
Address: 9 E. 13th St., Tempe, AZ 85281
Telephone: 602-366-5080
Email: pcagney@thecagneycompany.com
Web: www.thecagneycompany.com

The Cagney Company provides exceptional fundraising consulting services to help nonprofits realize their own genius, fulfill their potential and create bright futures. We maintain the highest ethical standards and operate in best practices and proven principles. Our distinguished team has raised more than \$500,000,000 for great nonprofits, large and small, around the world.

President and CEO Penelope Cagney MFA, MA, CFRE, named one of the Top Six Fundraising Experts in the US by Philanthropy Media, has more than 30 years of experience as a consultant in fundraising, governance and planning and has helped clients achieve multi-million dollar goals in transformative fundraising programs. Penelope Cagney serves on the Board of the Association of Fundraising Professionals (AFP) US Foundation for Philanthropy. Prior to that she served on AFP's Global Association Board. She served as a member of the Wish Fund Committee of Make-A-Wish International, which provides capacity building grants to its affiliates in more than 50 countries; on the 2017 International Fundraising Summit Committee; and on the Selection Committee for the 2017 Asia Philanthropy Awards. She has also served on AFP Greater Arizona Chapter's board and received a President's Award for Outstanding Service and Excellence in Education.

Penelope is a Certified Fundraising Executive (CFRE) and BoardSource Certified Governance Consultant. She has served on a number of boards, including Phoenix Art Museum Costume Institute; Renaissance Society at The University of Chicago; New Group at Museum of Contemporary Art Chicago; and Creative Council at Chicago Academy of the Arts.

She has taught fundraising and strategic planning in the Arizona State University Nonprofit Management Institute; and fundraising, governance, communications and other nonprofit management topics at Columbia College and School of the Art Institute, Chicago; and was a Distinguished Visiting Professor at American University in Cairo, Egypt.

She is editor of "Global Best Practices for CSO, NGO and Other Boards: Lessons From Around the World" (Wiley/BoardSource 2018); co-editor of the 2015 AFP/Skystone Partners Prize in Research winner and planetcause.org 2015 Book Choice awardee "Global Giving: How the World is Changing the Rules of Philanthropy" (Chinese version of the former two books available from the Shanghai University Finance and Economic Press) and author of "Nonprofit Consulting Essentials: What Nonprofits and Consultants Need to Know" (Jossey-Bass 2010). Penelope has presented plenaries, key notes, and master classes on fundraising, leadership and other topics in China, Korea, Italy, Mexico, and Canada.



The Phoenix Philanthropy Group

Fundraising and Campaign Management, Development, Operations, and Infrastructure; Prospect Development; Alumni and Constituent Relations; Strategic, Campaign, and Annual Planning; Interim Management; Volunteer Leadership Development, Management, and Training; Executive Coaching, Training, and Development; Evaluations

Contact: Richard Tollefson / Amy Mulhern
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The Phoenix Philanthropy Group provides customized services to accelerate and enhance fundraising performance and build organizational strength. By combining deep expertise, data, and insight to craft your comprehensive action plan, we help equip you with coaching and tools to optimize fundraising performance and impact. It may sound idealistic, but our goal really is to make the world a better place. And our bet is that you have that same vision, too.

While we are passionate and idealistic at The Phoenix Philanthropy Group, we are equally pragmatic and professional. Changing the world – and changing your organization by becoming a part of your team – requires personal energy, practical experience, great ideas, and genuine commitment.

We specialize in the following areas:

- Fundraising Campaigns and Major Gift Development
- Prospect, Donor, and Volunteer Leadership Relationship Management
- Strategic, Annual, and Campaign Planning

We are ready if you are.



Synergy Philanthropy, LLC

Annual Giving, Board Development, Capital/Endowment Campaigns, Development Planning, Interim Management, Major Gifts, Planned Giving, Strategic Planning, Infrastructure and Capacity Building, Women Focused Donor Strategies, Retention and Return on Relationship Focused Practices, Case for Support Development

Contact: Alan Knobloch / Michele Rebeor

Address: 7650 S McClintock Drive, Suite 103-330, Tempe, AZ 85284

Telephone: Alan: 602-525-1262 Michele: 602-402-0567

Email: alan@alanknobloch.com / michele@michelerebeor.com

Web: synergyphilanthropy.com

Synergy Philanthropy principals, Alan Knobloch, CFRE and Michele Rebeor combine 60 years of experience in the Arizona nonprofit sector to form a unique, well-rounded and highly experienced team. Their array of proficiency and practice offers clients a rare level of comprehensive insight to guide most professional fundraising activities.

Alan specializes in Major and Planned Gift strategies that support sustainability. As a former principal gift officer, he understands portfolio development, cultivation and solicitation strategies and the organizational structures necessary to sustain those efforts over time.

Michele specializes in donor engagement and maximizing relationships for greater retention. Additionally, she offers a rare decade of hands-on experience leading a Women & Philanthropy program and helps nonprofits integrate strategies that acknowledge the transformational role women provide in philanthropy.

Synergy Philanthropy understands there is no “one size fits all” template of practice, so they listen, adapt, innovate, and customize their work to accommodate each client’s needs.

Contact Synergy Philanthropy to:

- Build capacity and infrastructure.
 - Establish/advance your major gift, planned gift, recurring and annual programs.
 - Discuss interim support for vacant fundraising positions.
 - Help inform and inspire your staff, board or volunteers.
 - Create/integrate strategies that better accommodate women as donors.
 - Evaluate campaign potential and/or conduct feasibility studies.
 - Discuss your fundraising needs so we can determine how to best help you.
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GivingSmith

Board Development, Capital/Endowment Campaigns, Development Planning, Major Gifts, Planned Giving, Charitable Gift Annuities, Donor Advised Funds, Starting a Legacy Society

Contact: Judith A. Smith, MA, CFRE

Address: 10 W. Minnezona, #1099, Phoenix, AZ 85013

Telephone: 314-484-2112

Email: judi@givingsmith.net

Web: <https://www.givingsmith.net>

Judi Smith has extensive experience across higher education, the arts, and national and international philanthropy. As President of GivingSmith, the depth of her experience allows her to quickly assess an organization's situation and guide them toward solutions that advance their mission.

She has been an executive director, a specialist for gift planning and capital campaigns, a marketing and communications manager, a teacher, writer, coach and mentor. As senior director of planned giving for Arizona Community Foundation, Judi directed the Arizona Endowment Building Institute and taught gift planning basics for nonprofits around the state.

Judi's clients are engaged in conservation, animal welfare, higher and private education, social services, the arts, religion, and community foundations. She speaks nationally on various topics related to wise charitable giving.

She is past president of charitable gift planning councils in Phoenix and St. Louis. She has also served on AFP Boards and as a mentor and trainer for the CFRE exam. She currently serves on professional advisory councils for the Phoenix Zoo and the Arizona Foundation for Women. Among her honors and awards in the 2005 Outstanding Fundraising Professional of the Year from the Greater Ozarks Chapter of AFP.
