



CONSULTANTS' DIRECTORY

OVERVIEW OF SERVICES PROVIDED:

(Please see full listings below for more detailed information)

Cascalote Philanthropic Consulting: Annual Giving, Board Development, Capital/Endowment Campaigns, Development Planning, Grant Writing, Major Gifts, Planned Giving, Strategic Planning, Prospect Identification and Research

GivingSMITH: Charitable Gift Planning. Planned Giving. Accepting Gifts of Stock, Life Insurance, and Other Assets. Legacy Societies. Building Endowment. Capital and Endowment Campaigns. Development Planning. Major Gifts. Charitable Gift Annuities. Donor Advised Funds. Implications of the Great Wealth Transfer. Board Development. Mentoring Development Staff and Executive Directors.

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

Cascalote Philanthropic Consulting

Contact: Chris Sar, CFRE

Address: 7650 S. McClintock Dr., 103-173, Tempe, AZ 85284

Phone: 480-620-6785

Email: Cascalote.consulting@gmail.com

Web: <https://cascalote-consulting.com>

Areas of Expertise: Annual Giving, Board Development, Capital/Endowment Campaigns, Development Planning, Grant Writing, Major Gifts, Planned Giving, Strategic Planning, Prospect Identification and Research

Description: We help you develop the tools to engage board members, develop your case for support, and create an annual plan to realize the full potential of all your fundraising efforts. We are experienced in all phases of development from annual to major and planned giving, prospect identification and management to grant writing. We can help your organization plan for the future and train your board and team with the tools to be most effective.



GivingSMITH

Charitable Gift Planning. Planned Giving. Accepting Gifts of Stock, Life Insurance, and Other Assets. Legacy Societies. Building Endowment. Capital and Endowment Campaigns. Development Planning. Major Gifts. Charitable Gift Annuities. Donor Advised Funds. Implications of the Great Wealth Transfer. Board Development. Mentoring Development Staff and Executive Directors.

Contact: Judith A. Smith, MA, CFRE

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GivingSmith works primarily with established medium-sized nonprofits moving beyond annual fund, events, and grants to accepting complex assets and building endowment. Those programs have a well-established donor or membership base and a healthy number of volunteers actively engaged in their mission.

Clients for long-term engagements come from the fields of social services, the arts, conservation, higher and private education, animal welfare, religion, and community foundations. Short-term engagements are available for board and/or staff training, retreat facilitation, or speaking on a variety of topics involving charitable giving and philanthropy.

GivingSmith President Judi Smith has 40 years' experience in nonprofit charitable giving. She has been an Executive Director, a capital campaign specialist, a planned giving officer, a marketing and communications staffer, a speaker, writer, trainer, coach, and mentor. Prior to consulting, she served as a staff member for a symphony, an arts center, a large public university, an international social agency, and a statewide community foundation.

Believing it is important to give back to the profession, Judi Smith has served as president of both the St. Louis and Arizona charitable gift planning councils, an officer and board member for an Association of Fundraising Professionals Council. She currently serves on the board of directors for the Verde Valley Community Development Organization, the program committee for the Arizona Charitable Gift Planners, and the professional advisory councils for the Phoenix Zoo and Arizona Foundation for Women. She has been recognized with various honors and awards throughout her career.

GivingSmith enables nonprofits to aid their donors in making wise and generous gifts. We specialize in charitable gift planning (planned giving), endowment and capital campaigns, planning for development success, developing charitable gifting knowledge for board and mentoring staff, building a legacy society – and more. Visit our website for details.



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

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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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