



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. Development Audits. Development Writing. Major Gifts. Gift Acceptance Policies. Governance Documents Review. Charitable Gift Annuities. Donor Advised Funds. Implications of the Great Wealth Transfer. Board Development. Mentoring Development Staff and Executive Directors.

JAM Nonprofit Consulting LLC: Grant Writing, Program Development: Grant Training

Kim Joyce & Associates: Grant Writing

Moves Management Consulting: Interim Management, Full range of database evaluation and management services.

Resilience United Consulting: Annual Giving, Capital/Endowment Campaigns, Development Planning, Grant Writing, Strategic Planning, Storytelling, Peer 2 Peer, Corporate Relations, Digital Marketing, Coaching & Capacity Building for Small Development Teams.

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

Synergy Philanthropy, LLC: Annual Giving, Board Development, Capital/Endowment Campaigns, Development Planning, Interim Management, Major Gifts, Planned Giving, Strategic Planning, Retention and Donor Stewardship Strategies, Women Focused Donor Engagement, Feasibility Studies

Cascalote Philanthropic Consulting

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

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.



Moves Management Consulting

Interim Management, Full range of database evaluation and management services

Contact: Sasha Lewis

Address:

Telephone: 480-382-9650

Email: info@movesmc.com

Web: <https://movesmc.com/>

Moves Management Consulting is here to help your donor database work for you! Our team brings industry knowledge and years of experience working in the nonprofit space. We're your partners in tackling the challenges and competing priorities that nonprofits experience daily. By improving your data management and simplifying workflows, your organization can focus on what really matters: your donor relationships and mission.

Your database needs to align with your unique nonprofit's fundraising activities and long-term goals. Moves Management can help structure your donor database with your team and organization in mind.

Our services are designed to help optimize your donor database and fundraising activities. Below are examples of various ways our team can support you:

- Database management, audit, clean-up and implementation, and database search
- Gift entry
- Data tools and integrations support, database migration support, and prospect profile research.

Each proposal is tailored to fit your organization's unique needs. We look forward to serving so that you can serve your donors and your mission!

Some of the databases we work with:

Bloomerang

Bonterra EveryAction

DonorSnap

eTapestry

Kindful

Little Green Light

Mightycause

Raiser's Edge NXT

Salesforce

Virtuous



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

Contact: Richard Tollefson / Amy Malone

Address: 3301 E. Glenrosa Ave., Phoenix, AZ 85018

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Web: www.phoenixphilanthropy.com

Phoenix Philanthropy 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 Phoenix Philanthropy, 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, Retention and Donor Stewardship Strategies, Women Focused Donor Engagement, Feasibility Studies

Contact: Alan Knobloch, CFRE / Michele Rebeor, CFRE

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

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Email: alan@synergyphilanthropy.com / michele@synergyphilanthropy.com

Web: synergyphilanthropy.com

Synergy Philanthropy, LLC is led by principals Alan Knobloch, CFRE, and Michele Rebeor, CFRE, who bring more than 70 years of combined nonprofit fundraising and leadership experience serving organizations across Arizona and the US. Together, they offer a rare depth of expertise and a personalized approach that strengthens fundraising performance, builds sustainability, and expands organizational capacity.

Alan specializes in major and planned gift strategy, portfolio development, and systems and structures that support long-term philanthropic growth. A former principal gift officer, he helps organizations design and execute cultivation and solicitation programs that drive transformational results.

Michele focuses on donor engagement, relationship-building, and retention strategies that deepen loyalty and maximize lifetime donor value. She also brings a decade of leadership experience directing a Women & Philanthropy program, guiding nonprofits in recognizing and appealing to the role women play in giving.

Serving organizations of all sizes, including education, healthcare, human services, faith-based, and community agencies—Synergy Philanthropy rejects one-size-fits-all solutions. Instead, they listen first, then craft customized, hands-on strategies aligned with each client's goals, resources, and culture. Fully engaged in every partnership, they deliver "two for the price of one" expertise and collaborate with a network of specialists to ensure ethical, practical, and lasting results.

Contact Synergy Philanthropy to:

- Strengthen fundraising capacity
 - Lead capital and special campaigns
 - Grow major, planned, and annual giving
 - Provide interim or fractional leadership
 - Engage boards, staff, and volunteers
 - Advance women-centered philanthropy
 - Conduct readiness and feasibility studies
 - Access customized, expert guidance
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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. Development Audits. Development Writing. Major Gifts. Gift Acceptance Policies. Governance Documents Review. 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

Address: N 51st Ave #5110, Glendale, AZ 85308

Telephone: 314-484-2112

Email: judi@givingsmith.net

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

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, review of development literature and policies, development writing, retreat facilitation, or speaking on a variety of topics involving charitable giving and philanthropy.

GivingSmith President Judi Smith has more than 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 Councils. She currently serves on the board of directors for the Verde Valley Community Development Organization, the program committee for the Arizona Charitable Gift Planners, board of directors and Development Committee Co-Chair for the Colorado Planned Giving Round Table, and the professional advisory council for the Phoenix Zoo and Arizona Foundation for Women. Author of the book *The 72-Hour Planned Giving Starter Program*, 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.



JAM Nonprofit Consulting LLC

Grant Writing, Program Development: Grant Training

Contact: Jennie Miller, GPC, ACNP
Address: 2409 W. Orchid Lane, Phoenix, AZ, 85201
Telephone: 623-738-4514
Email: jennie@jamnonprofitconsulting.com
Web: <https://jamnonprofitconsulting.com>

Your passion is my passion.

Let JAM Nonprofit Consulting LLC help you grow your nonprofit. Here are some examples of how I can help your nonprofit move forward:

- Grant Prospect Research
- Assessing Grant Readiness
- Writing Grant Proposals
- Editing Current Materials
- Program Development
- Grant Training for Staff & Boards
- Board Orientations & Trainings

Jennie Miller has worked in the nonprofit sector for nearly 30 years. Based in Phoenix, Arizona, Jennie works with nonprofit organizations in the arts, healthcare, education, youth development, veterans' services, and human services.

In addition, Jennie sat on the National Board of the Grant Professionals Association from 2020-2025 and has been Grant Professional Certified (GPC) since 2012. She earned her Advanced Certified Nonprofit Professional credential in 2023. She is also a national trainer for Grant Writing USA. She has a BA from UC San Diego and a MA from New York University.

Are you trying to take your nonprofit to the next level? Call or email me to discuss how I can help

Kim Joyce & Associates
Grant Writing

Contact: Kim Joyce
Address: 14301 N. 87th Street, Ste 114
Telephone: 602-538-9144
Email: kim@kimjoyceandassociates.com
Web: <https://kimjoyceandassociates.com>

Kim Joyce & Associates (KJA) is a Grant Writing and Grant Consultancy firm headquartered in Scottsdale, Arizona. As the largest grant writing firm in Arizona and a leading firm in the nation, KJA has helped its clients secure more than \$428,000,000 in funding to realize their most important goals, build capabilities, create change, and achieve a lasting impact in their communities.

Resilience United Consulting

*Grant Writing & Management, Campaign Creation & Strategy,
Development & Communications Coaching*

Contact: Bethany Eggleston

Address: Greater Phoenix, AZ

Telephone: 619-756-0058

Email: bethany@resilienceunited.co

Web:

At Resilience United Consulting, I am on a mission to guide vital organizations to successful and efficient fundraising streams. This work ensures that nonprofits are resilient, having the strength and ability to grow so they can be the organizations the community needs— no matter the turbulence ahead.
