



Association of Philanthropic Counsel

**2021-2022 Member Firms  
Talent Directory**



# **2021-2022 Membership Directory**

*Committed to advancing philanthropy, together!*

We believe that the size of your practice shouldn't limit your access to information, resources and a national network of colleagues. Our mission at APC is simple, we want to elevate the practice and business of philanthropic consulting so that both your business and your clients thrive!



**a. von schlegell & co.**

**Abbie J von Schlegell**

**83 Hancock Rd, Pittsfield, MA 01201-3152**

**abbie@abbievonschlegell.com**

**(410) 908-9068**

**Member since 2012**

**Total Number of Consultants 1**

**GENERAL FUNDRAISING**

Major Gifts

Planned Gifts

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

Other **Special purpose**

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Strategic Planning

Organizational Development

**FUNDRAISING SUPPORT/ANALYTICS**

Prospect Research

Volunteer Management

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

**EXPERTISE**

All Nonprofits

Art Museums

Community Foundations

Foundations

Environments

Historical Societies

Human Services

Libraries

Performing Arts

Religious/Faith-Based

Social Services

**GEOGRAPHIC AREAS SERVED**

National

Northeast

Other **Massachusetts**



**Advancement Advisors**  
**Maureen Mahoney Hill, CFRE**  
**70 Chapel Ridge Place**  
**Pittsburgh, PA 15238**  
**maureen@advancementadvisorsgroup.com**  
**(412) 780-4708**  
**Member Since 2019**  
 Total Number of Consultants **3**

#### **GENERAL FUNDRAISING**

Major Gifts  
 Planned Gifts  
 Other **Development audits, development plans**

#### **CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies  
 Campaign Planning  
 Comprehensive Campaign Management

#### **COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus  
 Proposal Writing/Editing  
 Social Media

#### **BOARD SUPPORT**

Development, Governance, Retreats, Training

#### **FUNDRAISING SUPPORT/ANALYTICS**

Data/Trend Analytics  
 Fundraising Productivity  
 Prospect Research  
 Program Evaluation  
 Donor Management Software  
 Donor Retention

#### **OTHER SERVICES**

Interim Organization and Fundraising Leadership  
 Executive/Leadership Coaching  
 Program Evaluation  
 Direct Mail and Acquisition Mailings

#### **EXPERTISE**

All Nonprofits  
 Art Museums  
 Associations  
 Healthcare/Hospitals  
 Civil Rights/BIPOC  
 Foundations  
 Environments  
 Historical Societies  
 Human Services  
 Libraries  
 LGBTQIA  
 Performing Arts  
 Religious/Faith-Based

#### **GEOGRAPHIC AREAS SERVED**

Other **Southwestern Pennsylvania**

# Alexander Macnab & Co.

**Alexander Macnab & Co.**  
**Sandy Macnab, FAHP, CFRE**  
**900 N Franklin ST - Suite 604B**  
**Chicago, IL 60610**  
**Sandy@AlexanderMacnab.com**  
**Office (312) 642-1239; Cell (312) 560-1420**  
**Member since 2008**  
 Total Number of Consultants **1**

## **GENERAL FUNDRAISING**

Major Gifts  
 Planned Gifts

## **CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies  
 Campaign Planning  
 Comprehensive Campaign Management

## **COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

## **BOARD SUPPORT**

Development, Governance, Retreats, Training

## **FUNDRAISING SUPPORT/ANALYTICS**

Fundraising Productivity  
 Prospect Research  
 Program Evaluation  
 Donor Management Software

## **OTHER SERVICES**

Interim Organization and Fundraising Leadership  
 Executive Search  
 Executive/Leadership Coaching  
 Program Evaluation  
 Direct Mail and Acquisition Mailings

## **EXPERTISE**

Associations  
 Healthcare/Hospitals  
 Colleges/Universities  
 Community Foundations  
 Foundations  
 Human Services  
 Performing Arts  
 Social Services

## **GEOGRAPHIC AREAS SERVED**

National  
 Midwest



**Beam Outcomes**

**Joanne O'Brien Beam**

**6135 Park South Drive Suite 510**

**Charlotte NC 28210**

**joanne@beamoutcomes.com**

**(704) 945-7121**

**Member since 2020**

Total Number of Consultants **1**

**GENERAL FUNDRAISING**

Major Gifts

Planned Gifts

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Strategic Planning

Organizational Development

**FUNDRAISING SUPPORT/ANALYTICS**

Prospect Research

Program Evaluation

Team Building

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

Executive/Leadership Coaching

Program Evaluation

**EXPERTISE**

Art Museums

Colleges/Universities

Community Foundations

Foundations

Human Services

Performing Arts

Religious/Faith-Based

Social Services

**GEOGRAPHIC AREAS SERVED**

Southeast



## Betty Johnson & Associates

Betty Johnson & Associates

Betty Johnson, CFRE

5903 Longleaf Circle

Lawrence, KS 66049

bettyjohnsonassociates@yahoo.com

(785) 313-3632

Member Since 2008

Total Number of Consultants **1 with additional needed per project**

### GENERAL FUNDRAISING

Major Gifts

Planned Gifts

### CAPITAL & COMPREHENSIVE CAMPAIGNS

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

### BOARD SUPPORT

Development, Governance, Retreats, Training

Strategic Planning

Other **Strategic Doing**

### FUNDRAISING SUPPORT/ANALYTICS

Other **Development Audits**

### EXPERTISE

All Nonprofits

Art Museums

Associations

Healthcare/Hospitals

Community Foundations

Historical Societies

Human Services

Libraries

Religious/Faith-Based

Social Services

### GEOGRAPHIC AREAS SERVED

Midwest

# BRISTOL

## STRATEGY

### **Bristol Strategy Group**

Ellen G. Bristol

1100 SW 130th Ave., Suite H-411

Pembroke Pines, FL 33027

ellen@bristolstrategygroup.com

(786) 554-2666

Member since 2018

Total Number of Consultants **1 staff, 4 subcontractors**

### **GENERAL FUNDRAISING**

Other **Fundraising Strategy, Operations, Performance Management**

### **CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Other **Staff productivity assessments; database analysis**

### **COMMUNICATIONS & MARKETING**

Positioning and Branding

### **BOARD SUPPORT**

Development, Governance, Retreats, Training

Strategic Planning

Organizational Development

### **FUNDRAISING SUPPORT/ANALYTICS**

Data/Trend Analytics

Fundraising Productivity

Team Building

Donor Management Software

Donor Retention

### **OTHER SERVICES**

Executive/Leadership Coaching

### **EXPERTISE**

All Nonprofits

### **GEOGRAPHIC AREAS SERVED**

National

Other **Occasional international projects**





**Capstone Advancement Partners**

**Brigitte Roufail Peck**

**PO Box 18993**

**Atlanta, GA 31126**

**bpeck@capstoneadvancementpartners.com**

**(404) 798-4671; (800) 766-1930**

**Member since 2009**

**Total Number of Consultants 1**

**GENERAL FUNDRAISING**

Major Gifts

Planned Gifts

Grant Writing Research – Private Support

Other **Comprehensive Development Plans**

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

Proposal Writing/Editing

Other **Development communications - narratives, solicitations**

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Organizational Development

Other **strategic development planning (not organizational)**

**FUNDRAISING SUPPORT/ANALYTICS**

Prospect Research

Program Evaluation

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

Executive/Leadership Coaching

**EXPERTISE**

Community Foundations

Foundations

Human Services

Social Services

Other **Continued Care Retirement Communities**

**GEOGRAPHIC AREAS SERVED**

Southeast



**Carter**

**Steve Higgins**

**2145 14th Avenue, Suite 26**

**Vero Beach, FL 32960**

**info@carter.global**

**(941) 388-3414**

**Member since 2019**

**Total Number of Consultants 45**

**GENERAL FUNDRAISING**

Major Gifts

Planned Gifts

Grant Writing Research – Private Support

Grant Writing Research – Govt Support

Event Planning

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

Communication Audits

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Strategic Planning

Organizational Development

**FUNDRAISING SUPPORT/ANALYTICS**

Prospect Research

Program Evaluation

Volunteer Management

Team Building

Donor Management Software

Donor Retention

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

Executive/Leadership Coaching

Program Evaluation

**EXPERTISE**

All Nonprofits

**GEOGRAPHIC AREAS SERVED**

International

National



Superior Experience. Proven Results.

**Carter Consulting Group LLC**

**Julie Carter**

**2916 Dartmouth Road, Suite 200**

**Alexandria, VA 22314**

**juliecarter2@me.com**

**(703) 956-0097**

**Member since 2011**

Total Number of Consultants **1 principal, 2 project based**

**GENERAL FUNDRAISING**

Major Gifts

Planned Gifts

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Strategic Planning

**FUNDRAISING SUPPORT/ANALYTICS**

Data/Trend Analytics

Donor Management Software

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

**EXPERTISE**

Associations

Historical Societies

Performing Arts

Other **Public Policy / Advocacy**

**GEOGRAPHIC AREAS SERVED**

National

Other **DC region/national organizations HQ'd here**



**DMGroupConsulting**

**Diana Marquis, CFRE**

**1408 N. Riverfront Blvd., #245**

**Dallas, TX 75207**

**diana@dmgroupconsulting.com**

**(214) 557-5129**

**Member since 2021**

Total Number of Consultants **1**

**GENERAL FUNDRAISING**

Major Gifts

Event Planning

Other **organizaton assessment, coaching**

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Organizational Development

**FUNDRAISING SUPPORT/ANALYTICS**

Fundraising Productivity

Donor Retention

**OTHER SERVICES**

Executive/Leadership Coaching

**EXPERTISE**

Human Services

Performing Arts

Social Services



**Dwyer Philanthropy**

**Sheila D Schwartz**

**697 Stoneridge Drive**

**Adrian, MI 49221**

**sschwartz@dwyerphilanthropy.com**

**(517) 403-2512**

**Member since 2017**

Total Number of Consultants **1**

**GENERAL FUNDRAISING**

Major Gifts

Planned Gifts

Online Fundraising/Platforms

Event Planning

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

Other **Private Family Foundation Planning/Succession Planning**

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

Positioning and Branding

Public Relations

Graphic Design

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Strategic Planning

**FUNDRAISING SUPPORT/ANALYTICS**

Data/Trend Analytics

Fundraising Productivity

Prospect Research

Program Evaluation

Team Building

Donor Management Software

Donor Retention

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

Executive/Leadership Coaching

Direct Mail and Acquisition Mailings

**EXPERTISE**

All Nonprofits

**GEOGRAPHIC AREAS SERVED**

International

National

Other **Michigan & Ohio**



**Dynamic Development Strategies, LLC**

**Michelle Crim, CFRE**

**5100 Oak Mill Drive Fort Worth, TX 76135**

**mcrim@dynamicdevelopmentstrategies.com**

**(682) 273-0320**

Total Number of Consultants 3

**GENERAL FUNDRAISING**

Annual Campaigns

Grant Writing Research – Private Support

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

Proposal Writing/Editing

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Strategic Planning

Organizational Development

**FUNDRAISING SUPPORT/ANALYTICS**

Fundraising Productivity

Prospect Research

Team Building

Donor Management Software

Donor Retention

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

Executive Search

Executive/Leadership Coaching

Grantmaking – Family Foundations

Direct Mail and Acquisition Mailings

**EXPERTISE**

Art Museums

Healthcare/Hospitals

Colleges/Universities

Community Foundations

Human Services

Social Services

**GEOGRAPHIC AREAS SERVED**

Other **Texas**



**Eskin Fundraising Training**

**Jim Eskin**

**10410 Pelican Oak Dr.**

**San Antonio, Texas 78254-6727**

**jeskin@aol.com**

**(210) 415-3748**

**Member since 2021**

**Total Number of Consultants 1**

**GENERAL FUNDRAISING**

Major Gifts

Other **Fundraising Training for staff, board members and other volunteers**

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Other **Fundraising training -- making the ask**

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

**BOARD SUPPORT**

Development, Governance, Retreats, Training

**OTHER SERVICES**

Executive/Leadership Coaching

**EXPERTISE**

All Nonprofits

**GEOGRAPHIC AREAS SERVED**

Other **TX**



**Formula for Fundraising**

**Diana V. Hoyt**

**PO Box 10779**

**Phoenix, AZ 85064**

**diana@formulaforfundraising.com**

**Office (800) 752-3100; Cell (602) 722-3624**

**Member since 2019**

**Total Number of Consultants 1**

**GENERAL FUNDRAISING**

Major Gifts

Online Fundraising/Platforms

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Strategic Planning

**FUNDRAISING SUPPORT/ANALYTICS**

Donor Management Software

Donor Retention

Other **Donor Database Assessment & Implementation**

**OTHER SERVICES**

Executive/Leadership Coaching

**EXPERTISE**

Healthcare/Hospitals

Colleges/Universities

Foundations

Environments

Historical Societies

Human Services

Libraries

Social Services

Other **Animal Welfare**

**GEOGRAPHIC AREAS SERVED**

National

West





**Innovative Resources Group, Inc,**

**Beth N. Hershenhart**

**11 Round Table Rd.**

**Saratoga Springs, NY 12866**

**beth@innovativeresourcesgroup.com**

**(518) 225-4057**

**Member since 2008**

Total Number of Consultants 5

**GENERAL FUNDRAISING**

Major Gifts

Planned Gifts

Grant Writing Research – Private Support

Online Fundraising/Platforms

Other **Communications and creative services**

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

Proposal Writing/Editing

Communication Audits

Positioning and Branding

Public Relations

Graphic Design

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Strategic Planning

Organizational Development

**FUNDRAISING SUPPORT/ANALYTICS**

Fundraising Productivity

Prospect Research

Volunteer Management

Team Building

Donor Management Software

Donor Retention

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

Executive/Leadership Coaching

Grantmaking – Family Foundations

**EXPERTISE**

All Nonprofits

Art Museums

Associations

Healthcare/Hospitals

Colleges/Universities

Community Foundations

Foundations

Environments

Historical Societies

Human Services

LGBTQIA

Performing Arts

Religious/Faith-Based

Social Services

**GEOGRAPHIC AREAS SERVED**

Northeast

Other **California**



**K2 Consulting Group**

**Kathy Kraas**

**5428 Bromely Drive**

**Oak Park, CA 91377**

**Offices in LA and Chicago**

**kkraas@reachk2.com**

**(310) 756-7714; (312) 420-9978**

**Member since 2008**

Total Number of Consultants **1 full time, rest on contracts**

**GENERAL FUNDRAISING**

Major Gifts

Other **Board development**

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

**COMMUNICATIONS & MARKETING**

Positioning and Branding

**BOARD SUPPORT**

Development, Governance, Retreats, Training

**FUNDRAISING SUPPORT/ANALYTICS**

Fundraising Productivity

Prospect Research

Volunteer Management

Donor Retention

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

Executive/Leadership Coaching

**EXPERTISE**

All Nonprofits

Associations

Civil Rights/BIPOC

Colleges/Universities

Foundations

Environments

Human Services

Performing Arts

Social Services

Other **Environmental Coalitions**

**GEOGRAPHIC AREAS SERVED**

International

National

Northeast

Midwest

Southeast

Plains States

Pacific Northwest

West

Other **California**



## KENDA LOVECCHIO CONSULTING

**Kenda Lovecchio Consulting**  
**Kenda Lovecchio**  
**2005 Tall Chief**  
**Leander, TX 78641**  
**kendalovecchio@outlook.com**  
**(773) 860-0377**  
**Member since 2021**  
 Total Number of Consultants **1**

### **GENERAL FUNDRAISING**

Annual Campaigns  
 Major Gifts  
 Grant Writing/Research – Private Support  
 Online Fundraising and Platforms (e-Philanthropy)  
 Event Planning

### **CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies  
 Campaign Planning  
 Comprehensive Campaign Management

### **COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus  
 Proposal Writing/Editing

### **BOARD SUPPORT**

Development, Governance, Retreats, Training

### **FUNDRAISING SUPPORT/ANALYTICS**

Fundraising Productivity  
 Team Building  
 Donor Management Software  
 Donor Retention  
 Other **Membership Programs**

### **OTHER SERVICES**

Interim Organization and Fundraising Leadership  
 Executive/Leadership Coaching  
 Grantmaking – Family Foundations  
 Direct mail and Acquisition Mailings

### **EXPERTISE**

All Nonprofits  
 Art Museums  
 Environments  
 Performing Arts

### **GEOGRAPHIC AREAS SERVED**

National



**Leadership Design Alliance**  
**Michelle Sherbun**  
**1409 Burr Oak Rd., Suite 111A**  
**Hinsdale, IL 60521**  
**michelle@michellesherbun.com**  
**(708) 638-1974**  
**Member since 2013**  
 Total Number of Consultants **1 plus multiple subcontractors**

**GENERAL FUNDRAISING**  
 Other **Executive Coaching and Organizational Development**

**BOARD SUPPORT**  
 Development, Governance, Retreats, Training  
 Strategic Planning  
 Organizational Development  
 Other **Leadership Development**

**FUNDRAISING SUPPORT/ANALYTICS**  
 Team Building

**OTHER SERVICES**  
 Executive/Leadership Coaching  
 Other **Consultant Coaching and Leadership Development**

**EXPERTISE**  
 Associations  
 Human Services  
 Social Services

**GEOGRAPHIC AREAS SERVED**  
 National



Loring, Sternberg & Associates

**Loring, Sternberg and Associate**  
**Dave Sternberg, CFRM, Founding Partner**  
 7557 Hoover Rd  
 Indianapolis, IN 46260  
 dave@loringsternberg.com  
 (317) 506-7695  
**Member since 2020**  
 Total Number of Consultants 5

#### **GENERAL FUNDRAISING**

Major Gifts  
 Online Fundraising/Platforms

#### **CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies  
 Campaign Planning  
 Comprehensive Campaign Management

#### **COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus  
 Social Media

#### **BOARD SUPPORT**

Development, Governance, Retreats, Training  
 Strategic Planning  
 Organizational Development  
 Other **Board Fundraising Training and Support**

#### **FUNDRAISING SUPPORT/ANALYTICS**

Data/Trend Analytics  
 Fundraising Productivity  
 Other **Board Fundraising Training**

#### **OTHER SERVICES**

Direct Mail and Acquisition Mailings

#### **EXPERTISE**

All Nonprofits  
 Art Museums  
 Associations  
 Healthcare/Hospitals  
 Community Foundations  
 Foundations  
 Environments  
 Historical Societies  
 Human Services  
 LGBTQIA  
 Military  
 Performing Arts  
 Social Services

#### **GEOGRAPHIC AREAS SERVED**

International



**M. Gale & Associates**

**Missy Gale**

**3000 Race St, Ste 108**

**Fort Worth, TX 76111**

**info@MGaleAssociates.com**

**(888) 647-7942**

**Member since 2011**

Total Number of Consultants **13**

**GENERAL FUNDRAISING**

Major Gifts

Planned Gifts

Grant Writing Research – Private Support

Grant Writing Research – Govt Support

**CAPITAL CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

Proposal Writing/Editing

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Strategic Planning

Organizational Development

**FUNDRAISING SUPPORT/ANALYTICS**

Data/Trend Analytics

Fundraising Productivity

Prospect Research

Program Evaluation

Volunteer Management

Team Building

Donor Management Software

Donor Retention

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

Executive Search

Executive/Leadership Coaching

Program Evaluation

**EXPERTISE**

All Nonprofits

Art Museums

Associations

Healthcare/Hospitals

Community Foundations

Foundations

Environments

Historical Societies

Human Services

Performing Arts

Religious/Faith-Based

Social Services

**GEOGRAPHIC AREAS SERVED**

Other **North Texas**



**Mark Davy & Associates**

**Michael Davy**

**4035 Brookside Ave, Minneapolis, Minnesota 55416**

**michael@markdavyassociates.com**

**(952) 929-0444**

**Member since 2008**

Total Number of Consultants **2**

**GENERAL FUNDRAISING**

Major Gifts

Event Planning

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

Communication Audits

Graphic Design

Social Media

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Organizational Development

**FUNDRAISING SUPPORT/ANALYTICS**

Prospect Research

Program Evaluation

Donor Retention

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

Executive Search

**EXPERTISE**

Art Museums

Healthcare/Hospitals

Colleges/Universities

Foundations

Human Services

Military

Religious/Faith-Based

Social Services

**GEOGRAPHIC AREAS SERVED**

Midwest



**Melissa S. Brown & Associates, LLC**

**Melissa S. Brown**

**11804 SE 15th St**

**Vancouver, WA 98683**

**msbrownllc@att.net**

**(317) 506-5651**

**Member since 2012**

**Total Number of Consultants 1**

**GENERAL FUNDRAISING**

Grant Writing Research – Private Support

Other **constituent surveys as an engagement tool**

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Other I work with some APC firms to take feasibility interviews and create a report

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

Proposal Writing/Editing

Social Media

**FUNDRAISING SUPPORT/ANALYTICS**

Data/Trend Analytics

Prospect Research

Program Evaluation

Donor Retention

**OTHER SERVICES**

Program Evaluation

**EXPERTISE**

All Nonprofits

**GEOGRAPHIC AREAS SERVED**

International

National





## Fundraising with Impact

### Michael D. Rubin & Associates

Michael Rubin, MBA, CFRE

230 Linden Avenue

St. Louis, MO 63105

michael@mdrubin.com

(314) 920-5996

Member since 2014

Total Number of Consultants 6

#### GENERAL FUNDRAISING

Major Gifts

Planned Gifts

Grant Writing Research – Private Support

#### CAPITAL & COMPREHENSIVE CAMPAIGNS

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

#### COMMUNICATIONS & MARKETING

Writing Case Statements/Prospectus

Proposal Writing/Editing

Communication Audits

#### BOARD SUPPORT

Development, Governance, Retreats, Training

#### FUNDRAISING SUPPORT/ANALYTICS

Data/Trend Analytics

Prospect Research

#### OTHER SERVICES

Interim Organization and Fundraising Leadership

Executive/Leadership Coaching

#### EXPERTISE

Art Museums

Associations

Healthcare/Hospitals

Civil Rights/BIPOC

Colleges/Universities

Foundations

Human Services

Military

Performing Arts

Religious/Faith-Based

Social Services

#### GEOGRAPHIC AREAS SERVED

National



**Norton Philanthropic Counsel**

Melanie J. Norton, CFRE, MBA

PO Box 47055

Indianapolis, IN 46247

**Melanie@NortonCounsel.com**

317-730-6540

Member since 2020

Total Number of Consultants **1 full time employee & 2 independent consultants**

**GENERAL FUNDRAISING**

Annual Campaigns

Major Gifts

Planned Gifts

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

Other **Priorities identification**

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

Proposal Writing/Editing

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Strategic Planning

Organizational Development

**FUNDRAISING SUPPORT/ANALYTICS**

Fundraising Productivity

Program Evaluation

Volunteer Management

Team Building

Donor Retention

Other **Major and planned gifts training**

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

Executive/Leadership Coaching

Program Evaluation

**EXPERTISE**

Colleges/Universities

Foundations

Education

Human Services

Libraries

Performing Arts

Religious/Faith-Based

Social Services

**GEOGRAPHIC AREAS SERVED**

Midwest

Other **Broad Midwest although capacity for national, especially training via technology**



**Patti Ward, CFRE**  
**Patricia Ward**  
**21 Camino Loma Seco**  
**Santa Fe, NM 87540**  
**pawardcfre@gmail.com**  
**(806) 236- 8343**  
**Member since 2017**

**GENERAL FUNDRAISING**

Grant Writing Research – Private Support  
 Other **Creating Fund Development Plans**

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies  
 Campaign Planning  
 Comprehensive Campaign Management

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus  
 Proposal Writing/Editing

**BOARD SUPPORT**

Development, Governance, Retreats, Training  
 Strategic Planning  
 Organizational Development

**OTHER SERVICES**

Grantmaking – Family Foundations

**EXPERTISE**

Foundations  
 Human Services  
 Performing Arts  
 Religious/Faith-Based  
 Social Services



## Paul J. Strawhecker, Inc.

*Resource Development and Counsel for Nonprofits*

**Paul J. Strawhecker Inc.**  
**Paul J. Strawhecker MPA, ACFRE**  
**6901 Dodge Street**  
**Omaha, NE 68132**  
**ryan@pjstraw.com**  
**(402) 556-5785**  
**Member since 2008**  
 Total Number of Consultants **12**

### **GENERAL FUNDRAISING**

Major Gifts  
 Planned Gifts  
 Grant Writing Research – Private Support  
 Grant Writing Research – Govt Support  
 Online Fundraising/Platforms  
 Event Planning

### **CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies  
 Campaign Planning  
 Comprehensive Campaign Management

### **COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus  
 Proposal Writing/Editing  
 Public Relations  
 Graphic Design  
 Social Media

### **BOARD SUPPORT**

Development, Governance, Retreats, Training  
 Strategic Planning

### **FUNDRAISING SUPPORT/ANALYTICS**

Prospect Research  
 Program Evaluation

### **OTHER SERVICES**

Interim Organization and Fundraising Leadership

### **EXPERTISE**

All Nonprofits  
 Healthcare/Hospitals  
 Foundations  
 Libraries  
 LGBTQIA  
 Military  
 Performing Arts  
 Religious/Faith-Based  
 Social Services

### **GEOGRAPHIC AREAS SERVED**

National  
 Midwest  
 Plains States



**Rose City Philanthropy**  
 Lara Miller & Jeri Alcock  
 1470 NW Lancashire Ct.  
 Beaverton, OR 97006  
 lara@rosecityphilanthropy.com  
 jeri@rosecityphilanthropy.com  
 (503) 810-9173  
**Member since 2020**  
 Total Number of Consultants **2**

#### **GENERAL FUNDRAISING**

Major Gifts  
 Planned Gifts

#### **CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies  
 Campaign Planning  
 Comprehensive Campaign Management

#### **COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

#### **BOARD SUPPORT**

Development, Governance, Retreats, Training  
 Strategic Planning  
 Organizational Development  
 Other **Campaign Training**

#### **FUNDRAISING SUPPORT/ANALYTICS**

Fundraising Productivity  
 Prospect Research  
 Donor Retention

#### **OTHER SERVICES**

Executive Search  
 Executive/Leadership Coaching

#### **EXPERTISE**

All Nonprofits  
 Environments  
 Human Services  
 Libraries  
 LGBTQIA  
 Social Services

#### **GEOGRAPHIC AREAS SERVED**

Pacific Northwest  
 West  
 Other **OR**



**RYLANDER  
ASSOCIATES**

**Rylander Associates**  
**Carole V. Rylander**  
**6873 Blackwood Drive**  
**Dallas, Texas 75231**  
**carole@rylanderassociates.com**  
**(214) 348-9086; (214) 236-1840**  
**Member since 2008**  
 Total Number of Consultants **2**

**GENERAL FUNDRAISING**

Major Gifts  
 Planned Gifts  
 Grant Writing Research – Private Support

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies  
 Campaign Planning  
 Comprehensive Campaign Management

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus  
 Proposal Writing/Editing

**BOARD SUPPORT**

Development, Governance, Retreats, Training  
 Strategic Planning  
 Organizational Development

**FUNDRAISING SUPPORT/ANALYTICS**

Fundraising Productivity  
 Prospect Research  
 Team Building  
 Other **Technology Analytics & Programming**

**OTHER SERVICES**

Executive/Leadership Coaching  
 Other **Meeting Design & Facilitation**

**EXPERTISE**

All Nonprofits  
 Human Services  
 Religious/Faith-Based  
 Social Services  
 Other **Sororities**

**GEOGRAPHIC AREAS SERVED**

Other **TX**



# Sharon Leighty & Co.

~ Assisting your organization plan for today and tomorrow

## Sharon Leighty & Co.

Sharon Leighty

61535 S Hwy 97 Ste. 5-655

Bend, OR 97702

sharon@sharonleightyconsulting.com

(541) 408-5060

Member since 2014

Total Number of Consultants 1

### GENERAL FUNDRAISING

Major Gifts

Planned Gifts

Grant Writing Research – Private Support

Grant Writing Research – Govt Support

Other **Capacity Building**

### CAPITAL & COMPREHENSIVE CAMPAIGNS

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

### COMMUNICATIONS & MARKETING

Writing Case Statements/Prospectus

Proposal Writing/Editing

### BOARD SUPPORT

Development, Governance, Retreats, Training

Organizational Development

### FUNDRAISING SUPPORT/ANALYTICS

Fundraising Productivity

Prospect Research

Donor Management Software

Donor Retention

### OTHER SERVICES

Grantmaking – Family Foundations

Direct Mail and Acquisition Mailings

### EXPERTISE

All Nonprofits

### GEOGRAPHIC AREAS SERVED

Other **OR**



**Talem Consulting**  
**Rachel Branaman**  
**3815 Benton Ave**  
**Richmond VA 23222**  
**rachel@talemconsulting.com**  
**(972) 998-2749**  
**Member since 2019**  
 Total Number of Consultants 9

#### **GENERAL FUNDRAISING**

Grant Writing Research – Private Support  
 Online Fundraising/Platforms  
 Other **DEI in fundraising practices**

#### **CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

#### **COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus  
 Proposal Writing/Editing  
 Communication Audits  
 Graphic Design  
 Social Media

#### **BOARD SUPPORT**

Development, Governance, Retreats, Training  
 DEIA Training  
 Strategic Planning  
 Organizational Development

#### **FUNDRAISING SUPPORT/ANALYTICS**

Fundraising Productivity  
 Prospect Research  
 Donor Management Software

#### **OTHER SERVICES**

Interim Organization and Fundraising Leadership  
 Executive/Leadership Coaching

#### **EXPERTISE**

Civil Rights/BIPOC  
 Human Services  
 Performing Arts  
 Religious/Faith-Based  
 Social Services

#### **GEOGRAPHIC AREAS SERVED**

National





**The Rome Group**

**Dayna M. Stock**

**3101 Olive Street**

**St. Louis, MO 63101**

**dayna@theromegroup.com**

**(314) 533-0930**

**Member since 2008**

Total Number of Consultants **8**

**GENERAL FUNDRAISING**

Major Gifts

Planned Gifts

Grant Writing Research – Private Support

Grant Writing Research – Govt Support

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Strategic Planning

Organizational Development

**FUNDRAISING SUPPORT/ANALYTICS**

Data/Trend Analytics

Fundraising Productivity

Prospect Research

Donor Management Software

Donor Retention

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

Executive/Leadership Coaching

**EXPERTISE**

Art Museums

Associations

Healthcare/Hospitals

Colleges/Universities

Foundations

Environments

Historical Societies

Human Services

Libraries

Performing Arts

Religious/Faith-Based

Social Services

**GEOGRAPHIC AREAS SERVED**

Other **St. Louis, MO**

# *The Sheridan Group*

**The Sheridan Group**  
**David M. Coyne, CFRE**  
**10116 Gates Avenue**  
**Silver Spring, MD 20902**  
**dcoyne@sheridangp.com**  
**(703) 626-9899**  
**Member since 2014**  
Total Number of Consultants **3**

## **GENERAL FUNDRAISING**

Major Gifts

## **CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

## **EXPERTISE**

Associations

## **GEOGRAPHIC AREAS SERVED**

National



**The Write Source, LLC**  
**Diane M. Gedeon-Martin**  
**583 Goodale Hill Rd, Glastonbury, CT 06033**  
**diane@write-source.com**  
**(860) 657-9734**  
**Member since 2019**  
 Total Number of Consultants **1**

**GENERAL FUNDRAISING**

Grant Writing Research – Private Support  
 Grant Writing Research – Govt Support

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus  
 Proposal Writing/Editing

**FUNDRAISING SUPPORT/ANALYTICS**

Other **Grantmaker research (different than prospect research)**

**EXPERTISE**

All Nonprofits  
 Art Museums  
 Healthcare/Hospitals  
 Civil Rights/BIPOC  
 Colleges/Universities  
 Foundations  
 Environments  
 Historical Societies  
 Human Services  
 Libraries  
 Performing Arts  
 Religious/Faith-Based  
 Social Services

**GEOGRAPHIC AREAS SERVED**

National



**Thread Strategies**

**Loree Lipstein**

**5619 Western Ave NW**

**Washington, DC 20015**

**Loree@threadstrategies.com**

**(202) 805-2585**

**Member since 2019**

**Total Number of Consultants 7**

**GENERAL FUNDRAISING**

Major Gifts

Planned Gifts

Grant Writing Research – Private Support

Grant Writing Research – Govt Support

Online Fundraising/Platforms

Event Planning

Other

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

Proposal Writing/Editing

**BOARD SUPPORT**

Development, Governance, Retreats, Training

**FUNDRAISING SUPPORT/ANALYTICS**

Data/Trend Analytics

Fundraising Productivity

Prospect Research

Donor Management Software

Donor Retention

**EXPERTISE**

All Nonprofits

**GEOGRAPHIC AREAS SERVED**

International

National



**ANNE PEYTON, CPF, CFRE**  
**Yellow Brick Road™**

helping clients focus on customers  
 develop capacity  
 and create results

**Yellow Brick Road Consulting**

**Anne Peyton**

**PO Box 300**

**S. Strafford, VT 05070**

**anne@yellowbrickroadconsulting.com**

**(802) 765-4743**

**Member since 2014**

**Total Number of Consultants 1**

**GENERAL FUNDRAISING**

Major Gifts

Planned Gifts

Other **development assessments**

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Other **Campaign counsel, not management**

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Strategic Planning

Organizational Development

**FUNDRAISING SUPPORT/ANALYTICS**

Donor Retention

Other **donor stewardship; development planning**

**EXPERTISE**

Healthcare/Hospitals

Colleges/Universities

Foundations

Environments

Historical Societies

Libraries

Performing Arts

Social Services

**GEOGRAPHIC AREAS SERVED**

Other **Upper valley of NH, VT**



**Your Philanthropy LLC**

**Kristi Meyers Gallup**

**111563 Templar Drive**

**St. Louis, MO 63141**

**kristi@yp-stl.com**

**(314) 308-3066**

**Member since 2020**

Total Number of Consultants **3**

**GENERAL FUNDRAISING**

Major Gifts

Planned Gifts

Grant Writing Research – Private Support

Other **Capital and Comprehensive campaigns**

**CAPITAL & COMPREHENSIVE CAMPAIGNS**

Feasibility Planning/Studies

Campaign Planning

Comprehensive Campaign Management

**COMMUNICATIONS & MARKETING**

Writing Case Statements/Prospectus

Proposal Writing/Editing

**BOARD SUPPORT**

Development, Governance, Retreats, Training

Organizational Development

**FUNDRAISING SUPPORT/ANALYTICS**

Fundraising Productivity

Program Evaluation

Volunteer Management

Team Building

Donor Retention

**OTHER SERVICES**

Interim Organization and Fundraising Leadership

Executive Search

Executive/Leadership Coaching

Program Evaluation

Grantmaking – Family Foundations

Direct Mail and Acquisition Mailings

**EXPERTISE**

All Nonprofits

**GEOGRAPHIC AREAS SERVED**

National

Other **Missouri**



## Code of Ethics

### **Representatives of member firms of the Association of Philanthropic Counsel pledge to:**

- Accurately represent their professional expertise and experience.
- Base fees on the value of their professional expertise and experience; mutually agree with clients on fees in advance of engagements; and not accept compensation based on a percentage of charitable contributions.
- Refrain from guaranteeing financial fundraising results.
- Maintain the confidentiality of privileged client information.
- Disclose real and perceived conflicts of interest.
- Uphold the Donor Bill of Rights.

## Standards of Professional Practice

### **To best serve clients, APC member firms promise to:**

- Promote the spirit of philanthropy.
- Serve institutions whose missions they support.
- Assist clients in making decisions that advance their missions and strengthen their organizations.
- Support volunteers and staff in fulfilling their roles as fundraisers and refuse to serve as a paid solicitor.
- Avoid receiving and processing charitable gifts on behalf of clients.
- Place authority over and control of fundraising expenses with clients.
- Refrain from charging a fee for initial meetings with prospective clients interested in engaging their services.
- Continually update their professional knowledge.
- Advocate legislation and regulations promoting philanthropy.
- Adhere to all laws and regulations governing the profession.
- Provide high quality service and draw upon the professional expertise of other APC members.