



## Current and Former Clients

- **Arcadia University Department of Public Health** (Glenside, PA)  
Creation and execution of a strategic planning process engaging standing and adjunct faculty and stakeholders.
- **Bucks County Bar Association** (Doylestown, PA)  
Development of membership management plans and materials, supporting strategic planning, and providing counsel to the new Executive Director around best practices for managing a nonprofit organization.
- **Bucks County Bar Foundation** (Doylestown, PA)  
Establishment of committees of the Board of Trustees, development of policies for managing fundraising, selection and population of fundraising database, establishment of its first endowment, and planning/execution of its first major gift fundraising initiative.
- **Bucks County Health Improvement Partnership** (Newtown, PA)  
Establishment of an advisory board. Grant writing.
- **Bucks County Opportunity Council** (Doylestown, PA)  
Economic Self-Sufficiency Foundation launch, fundraising policy development, community engagement strategies, and board training on "Major Gift Fundraising – Rules of the Game."
- **Community Action Association of Pennsylvania** (Harrisburg, PA)  
Presentation on "Major Gifts 101: Relationships Mean More Money for Mission."
- **Da Vinci Science Center** (Allentown, PA)  
Board training on "Friend Raising Tools for Effective Fundraising."
- **Fé Foundation of the Hispanic Chamber of Commerce** (Lehigh Valley, PA)  
Strategic planning, fundraising training and consultation, and board development.
- **Free Library of New Hope and Solebury** (New Hope, PA)  
Major gift fundraising strategies, database selection and implementation, campaign feasibility study, community engagement plan, and successful campaign management.
- **Generations of Indian Valley** (Souderton, PA)  
Creation of first development plan and donor prospect pipeline, board retreat facilitation, board training on "Friend Raising Tools for Effective Fundraising," \$1 million capital campaign planning and execution.
- **Heinz-Menaker Senior Center** (Harrisburg, PA)  
Community needs assessment and engagement, board recruitment, and board development.



- **Hepatitis B Foundation** (Doylestown, PA)  
Strategic plan facilitation, \$3 million campaign execution, and major gift consultation services.
- **Inspired Spine** (Ottsville, PA)  
Nonprofit start-up consultation services including strategic planning with core ideology and vision development, and advisory board establishment.
- **Keystone Disaster Spiritual Care Network** (Commonwealth of PA)  
Creation and execution of a strategic planning process engaging board members and key stakeholders.
- **Laurel House** (Norristown, PA)  
Strategic plan facilitation. Board evaluation. Board training programs on friend-raising techniques and maximizing the board member experience.
- **Lehigh Valley Community School Network** (Allentown, PA)  
Capacity assessment and strategic planning process.
- **Libertae** (Bensalem, PA)  
Board training in friend raising techniques. Corporate and foundation strategy development and grant writing.
- **Lower Bucks Family YMCA** (Fairless Hills, PA)  
Board training in friend raising techniques. Corporate and foundation strategy development and grant writing. Strategy to build community engagement with KaBOOM! playground project.
- **Northern Lancaster County Chamber of Commerce** (Lancaster, PA)  
Strategic planning services and facilitation.
- **North Penn United Way** (Kulpsville, PA)  
Presentation on "Friend Raising Tools for Effective Fundraising."
- **NORWESCAP – Northwest New Jersey Community Action Partnership** (Phillipsburg, NJ)  
Board training and consultation around establishing a major gift fundraising program.
- **Pennsylvania Association of Senior Centers** (PA - Statewide)  
Presentation on "Critical and Emergent Issues in Fundraising."
- **Penn State Brandywine** (Media, PA)  
Major gift pipeline development, solicitation visits, and proposal writing.
- **PCGCA- Philadelphia Committee of the Garden Club of America** (Philadelphia, PA)



Presentation on “Board Member Responsibilities and Opportunities.”

- **Pitch In For Baseball & Softball** (Harleysville, PA)  
Strategic planning, board retreat facilitation, database selection and implementation, staff hiring and onboarding support.
- **Partnership for Philanthropic Planning of Greater Philadelphia** (Philadelphia, PA)  
Presentation on “Involving Nonprofit Board Members in Planned Giving.”
- **Rainbow Fund of Bucks County, Part of the Delaware Valley Legacy Fund** (Philadelphia, PA)  
Community needs assessment, including survey development, focus group planning and delivery, and creation of a comprehensive written report.
- **RSVP of Bucks County** (Doylestown, PA)  
Advisory board recruitment, board management, and consultation on policy development.
- **Somerset County Department of Human Services** (Somerville, NJ)  
Engagement of leadership staff in a strategic planning initiative.
- **South Central Community Action Program** (Gettysburg, PA)  
Board, staff, and volunteer training on “Friend Raising Tools for Effective Fundraising.”
- **Snipes Farm and Education Center** (Morrisville, PA)  
Establishing a major gift fundraising program. Creation and engagement of committees of the Board. Regular strategic planning and board retreat facilitation.
- **St. Catherine Laboure Medical Clinic** (Germantown, PA)  
Board training and consultation around establishing a major gift fundraising program. Assistance with interviewing, hiring, and training a front-line fundraiser.
- **United Way of Bucks County** (Fairless Hills, PA)  
Primary source research and presentation on “Volunteer Management: Creating a Win-Win Experience.”
- **Warrington Township/Warrington Lions Club** (Warrington, PA)  
Structure and support execution of a \$2 million capital campaign to raise funds for Lions Pride Park – a fully accessible, intergenerational recreation area.
- **Woman's National Farm & Garden Association** (National)  
Leadership of a strategic visioning session and strategic planning process.
- **Youth Orchestra of Bucks County** (Yardley, PA)  
Board recruiting, board development, fundraising consultation services, assistance with defining the job of Director of Development, interviewing, hiring, and creating a performance management plan for the position.