

# Fitz Nonprofit Consulting Client List

A fresh approach to fundraising, board development and other mission-critical areas of nonprofit management.

Fitz Nonprofit Consulting's goal is to spend the client's resources – financial, time, and human – most prudently. We are able to accomplish this through our ability to engage key stakeholders to quickly grasp and understand your organization's mission and culture, assess the challenges and opportunities that exist, and offer sharp insight combined with practical tools that result in success.

We've been helping our clients succeed since 2004.

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## Nativity Prep Academy

May 2016-present

Providing hands-on consulting services to advise on increasing major gift capacity to prepare the organization for a capital campaign.

## Thrive Charter School

February 2017-present

Conducting an assessment of potential fundraising in order to launch a capital campaign for \$11 million to build a new school campus in Linda Vista.

## Habitat for Humanity Wyoming *in partnership with The Compass Group*

August 2016-present

Providing campaign counsel for a \$10 million campaign for The Grove Housing Project. Successfully completed a feasibility study to test this goal.

## San Diego River Park Foundation

January 2017-present

Providing campaign counsel for a \$21.5 million campaign to build a Discovery Center along the San Diego River Park by working side-by-side with the staff and board to identify and

cultivate campaign donors as well as train and prepare the board with the tools to re-launch the campaign and make successful solicitations

## Foundation for Grossmont and Cuyamaca Colleges

October 2016-March 2017

Conducting a feasibility study to determine how to successfully raise \$10 million for student scholarships

## The Academy of Our Lady of Peace

June 2015-September 2016



Conducted a development audit to enhance the major gifts program and working with the staff to implement robust fundraising efforts. Facilitated preparation for the capital campaign in partnership with the advancement department.

### **The Winston School**

April -July 2016

Conducted a feasibility study to determine how to successfully raise \$8 million for a new campus and scholarship fund

### **Cathedral Catholic High School**

March -June 2016

Conducted a feasibility study to determine how to successfully raise \$60 million for a new theatre, purchase adjoining property and scholarship/endowment fund

### **Habitat for Humanity San Diego**

June-October 2015

Conducted a feasibility study to determine how to successfully raise \$6 million to build a 26-home project for veterans

### **The Nature Conservancy Colorado Chapter** *in partnership with The Compass Group*

September-December 2015

Conducted a feasibility study to determine how to successfully raise \$100 million for the conservation of land, forests, freshwater and global projects

### **The San Marcos Promise**

September 2014-September 2015

Completed a board development plan, strategic plan and fundraising plan for The San Marcos Promise

### **Employment & Community Options**

June 2013-June 2015

Conducted a development audit to develop a fundraising plan and work with the staff to implement robust fundraising efforts

### **San Diego Children's Discovery Museum**

March 2013- June 2015

Provided capital campaign counsel to the museum to raise \$3.2 million to purchase and renovate new museum facility

## Elevate Africa

October 2014-March 2015

Conducted a fundraising assessment and built a fundraising plan to determine the direction of the organization's programs and how to support them through fundraising

## Education Synergy Alliance

November 2013- December 2014

Conducted a development audit to determine the capacity of the organization to raise money and build a fundraising plan to implement to start fundraising efforts of raising \$1 million per year and then implemented fundraising efforts that achieved this goal

## Love Road Horse Sanctuary and Visitor's Center

August -December 2014

Conducted a feasibility study and built a campaign fundraising plan to determine how to successfully raise \$10 million to purchase 11,000-acre property in northwestern New Mexico and build a visitor's center

## San Diego County Veterinary Medical Association

March 2014-February 2015

Conducted a board assessment and regular board governance trainings to engage the board members further in their role and responsibilities while gaining a better understanding of board governance and best practices

## Professional Liability Agents Professional Liability Agents Network

September-April 2014

Conducted an organizational audit of the organization to reveal the strengths and challenges of the organization in order to prepare for strategic planning.

Facilitated the board retreat to create the strategic planning by identifying short- and long-term goals and objectives as well as determining the future vision of the organization

*“Renee jumped in and was quickly able to grasp our mission and model. She kept our team on track to meet deadlines, and her analysis enabled us to develop a plan that boosted confidence among board and staff.”*

- **Karen Begin, Habitat for Humanity San Diego**

## **Living Coast Discovery Center**

May -August 2013

Launched new fundraising efforts in partnership with the executive director, key staff members, board of directors and committee members resulting in \$145,000 additional funds raised in 4 months to keep the Center open

## **The Child's Primary School**

May-July 2013

Conducted a comprehensive survey of prospective and current families, to identify the challenges in the admissions process in order to improve family enrollment

## **FACE Foundation**

May-June 2013

Facilitated a board retreat to identify the strategic planning goals and objectives for the next year as well as determining the vision of the organization. Implemented best practices in board behavior and facilitation

## **City Heights Partnership for Children**

February-March 2013

Developed a fundraising plan for the new nonprofit organization including identifying major donors and key fundraising initiatives and strategies resulting in \$1,500,000 in solicitations

## **Colorado Rocky Mountain Schools** *in partnership with The Compass Group*

January-September 2012

Re-started a stalled campaign through partnering with board and staff to launch a new geographically-focused initiative that successfully identified, cultivated and solicited alumni as well as current and past parents throughout the United States resulting in six-figure dollar gifts

## **Alzheimer's Association**

August 2011-April 2012

Restructured development department with new hires, immediately implemented strategy with the interim executive director to approach and solicit major donors resulting in new and renewed gifts; worked with Board members to develop and implement cultivation receptions resulting in new donors

## City Heights Community Development Corporation

October 2011-April 2012

Developed fundraising plan to diversify fundraising efforts resulting in 100% board giving, first-ever year end appeal, inaugural gala and the development of major donor cultivation and solicitation efforts; implemented fundraising plan through Board and staff trainings and hands-on fundraising work

## City Heights Community Development Corporation

March 2012

Facilitated the fundraising component of a board retreat to develop and approve a board of directors give and get policy. All board members agreed to make a year-end donation, sell or purchase four tickets to the gala, confirm at least one auction item in-kind donation, provide at least one lead for a corporate sponsorship and confirm one donation to the Scholarship Fund.

*“Renee has an advanced understanding of fundraising and the many options available. She was wise about which ones made the most sense for us and then was quick to design and execute the program.”*

• Gail Vetter Levin, Alzheimer’s

## International Community Foundation Board Retreat

September 2011

Facilitated a board retreat to discuss the board’s role in implementing the strategic plan and developing board members’ role in fundraising. Through the retreat, members agreed to help the executive director fundraise by: serving on one committee, being an ambassador in the community on behalf of the organization, joining the speaker’s bureau, engaging in the discretionary grant making process, hosting house parties to introduce potential donors to the organization, and creating a Board donor advised fund.

## Bozeman Schools Foundation in partnership with The Compass Group

August 2011-present

Conducted a feasibility study that determined the Foundation needed to conduct the campaign in two phases leading to the successful launch and raising of \$2 million to complete Phase 1 that lay the foundation for a for a successful \$10 million Phase 2.

## Hubbard Foundation

August-October 2011

Conducted a development audit in order to create a fundraising plan to implement inaugural fundraising efforts including the cultivation and solicitation of major donors, recruitment and engagement of new Board members and their commitment of \$2,500 in board dues, grants, and direct mail appeals



## San Diego Foundation Arts & Culture

August 2011

Facilitated a conversation to build consensus around the strategic direction of the working group and developed a purpose statement and set of values.

## San Diego Architectural Foundation

March -May 2011

Engaged the board and staff to conduct a thorough strategic planning process that identified a vision, goals, and objectives to improve the organization's programs, fundraising and board engagement

## Carlsbad Village Association Revitalization Partnership

June-July 2011

Successfully engaged the board of directors to write and submit a proposal to the city of Carlsbad to gain funding to develop a Mainstreet Association for Carlsbad

## Chula Vista Nature Center

February 2009-June 2011

After the loss of \$1.2 million of their budget from the City, created fundraising plan to identify new donors and fundraising strategies to raise over \$400,000/year in new monies while implementing fundraising initiatives including a mid-year appeal that raised \$30,000 (66% increase from previous effort). Created and implemented a board development plan to reconstitute the new board of directors through identifying and recruiting company CEOs, influential community members and affluent donors. Trained the board on their role and responsibilities and recruited each member to actively participate in the board committees. Conducted a strategic planning process with the new board of directors and staff members to develop the vision for the organization and the overarching goals, objectives and actions for the next five years.

## Samaritan Aviation

July 2011

Facilitated a board retreat to lead board members in a discussion around their role and responsibilities as the board has transitioned from a working to a governing board, identifying what the Executive Director needed from the board, and how the board members can help fundraise for the organization.

## New Village Arts of Theatre

October 2010-January 2011

Determined that the proposed project was not a priority to potential donors and changed the scope of the project which resulted in maintaining a \$1year lease with the city and confirming the first six-figure gift in the history of the theatre

## Greater Golden Hill Community Development Corporation

May 2010

Facilitated a conversation to help board members understand their role as fundraisers and developed a give and get fundraising policy that was approved by the Board members at the retreat.

## Behavioral Diabetes Institute

August 2006-March 2010

Created a fundraising plan to implement inaugural fundraising efforts resulting in the organization's budget growing from \$0 to \$300,000 and increased year end letter revenue by five times over 4 years

## Rancho Santa Fe Community Center

November-December 2010

Wrote the year-end appeal letter by interviewing youth participants at the Center to create a personal appeal and developed the fundraising strategy behind the letter that included a \$10,000 donation challenge match made by the board of directors that resulted in raising \$30,000, twice the amount of donations from the previous year

*“Unlike other consultants who take a cookie-cutter approach, Fitz Consulting invests the time needed upfront to understand each client’s unique goals, passions, and market opportunities. This approach allows them to discover insights that might not have been obvious at the outset.”*

## The Arc of San Diego

September 2008-July 2009

Restarted a stalled campaign by providing extensive training to the board members that resulted in members’ actively cultivating and soliciting donors through small receptions

## Boys and Girls Club of Southwest County

January 2007-April 2009

Re-started a stalled campaign by engaging staff and key volunteers with a hands-on approach to confirm six- and seven-figure dollar gifts from Pechanga Indian Tribe, Kresge Foundation, W.M. Keck Foundation and Weingart Foundation

## **Woolly Mammoth Theatre** *in partnership with The Compass Group*

January 2008

Determined fundraising initiatives that would maximize this world-renowned theatre's ability to raise money by working with their unique culture and perspective

## **Country Montessori School**

August-October 2007

Effectively engaged board members in the project to lead the campaign with their personal fundraising efforts and giving

## **Foundation for Women**

August 2006 to August 2007

Developed fundraising plan to implement strategy to engage major donors resulting in significant gifts

## **Oak Grove School**

June 2007

Engaged staff to build a comprehensive fundraising plan that they could implement step-by-step to successfully cultivate and solicit campaign donors

## **Junior Achievement of San Diego**

September 2004-June 2005

Provided hands-on training with board and staff members, writing of case for support, cultivating potential donors through visiting similar projects resulting in the campaign's lead gift of \$1.5 million

## **The Linfield School Foundation**

March 2003- September 2004

Solicited current and past parents and alumni for gifts resulting in successful gifts and visibility in the local community to gain additional support

