

## WHY CHOOSE PMA? Seven Strategic Reasons

**Consistent Results** PMA can transform strategic planning into consistent bottom line results for organizations. PMA professionals have served as consultants, nonprofit executives, chief development officers, board members and volunteers. We know the rewards and challenges of the nonprofit sector and understand having high expectations despite limited resources.

**Constant Communication** By listening first, PMA is effective interacting with your top donors, cultivating your community's leaders and bringing along each of your staff members and volunteers.

**Organizational Experience** Whether we are advising, consulting or volunteering, PMA has worked with numerous organizations, from as far-reaching as Seed Programs International to as locally-focused as Jubilee Family Development Center in Lynchburg, V.A. This experience helps us to understand and improve your board, staff and volunteer structure and effectiveness.

**Regional Network** PMA can bring to bear a regional network of business professionals to support the planning, marketing and executive search functions. PMA has engagements across the southeast and remains connected throughout the Carolinas through professional affiliations including the William C. Friday Fellowship, the Morehead-Cain scholarship program and the Duke University, UNC Chapel-Hill and McColl School of Business alumni networks.

**Philanthropic Connections** Our connectivity to a wide variety of philanthropic organizations across the southeast delivers competitive data to effectively address your fundraising issues. Founder Patton McDowell serves on the board of the Association of Fundraising Professionals in Charlotte, N.C. and the local Leave A Legacy organization which focuses on charitable planned giving. He mentors young professionals for AFP and was a member of the Council for the Advancement and Support of Education (CASE) throughout 11 years in higher education administration.

**Expert Facilitation** PMA can facilitate your board retreat or staff planning session and deliver the results you are looking for. We draw on over 20 years of public speaking and facilitation experience including Special Olympics volunteer workshops in Canada, New Zealand and the Caribbean, as well as presentations and retreats for a diverse range of organizations including the Make-A-Wish Foundation of Central & Western North Carolina and the National Multiple Sclerosis Society – Mid-Atlantic Chapter.

**Community Orientation** We realize that the role of the volunteer remains integral to the success of your organization. Our volunteer roles with numerous community, church and school organizations provide PMA an invaluable and ongoing perspective on the realities of work in the nonprofit world.



[www.pattonmcdowell.com](http://www.pattonmcdowell.com)

**PMA** Patton McDowell  
& Associates, LLC

Philanthropic Counsel & Organizational Strategy

### SELECTED CLIENTS

**Arts & Science Council**  
Charlotte, N.C.

**Catawba Lands Conservancy**  
Charlotte, N.C.

**Children's Home Society**  
Greensboro, N.C.

**The Council for Children's Rights**  
Charlotte, N.C.

**David Belk Cannon Foundation**  
Gastonia, N.C.

**Greensboro College**  
Greensboro, N.C.

**Jubilee Family Development Center**  
Lynchburg, V.A.

**Kids First Surgical Team**  
Nashville, T.N.

**Metrolina Regional Scholars Academy**  
Charlotte, N.C.

**NC MedAssist**  
Charlotte, N.C.

**Seed Programs International**  
Phoenix, A.Z.

**UNCC Urban Institute**  
Charlotte, N.C.

*PMA provides outstanding philanthropic consulting services to maximize an organization's resources and help it achieve its mission.*

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## THE PMA TEAM



**Patton McDowell, CFRE**  
*Managing Director*

Patton McDowell has enjoyed a successful career in nonprofit leadership and management, fundraising, public speaking, strategic planning, and organizational development. His consulting experience has allowed him to work with a diverse set of nonprofit organizations across various sectors including education, arts and culture, healthcare, youth and family services, special populations and the environment. Clients include the Council for Children's Rights, American Red Cross, Alzheimer's Association, Greensboro College, UNC Charlotte, Catawba Lands Conservancy and Children's Home Society of NC. Patton is an accomplished speaker who has facilitated and led workshops throughout the Southeast with organizations such as Special Olympics International, Make-A-Wish Foundation, Specialized Alternatives for Family and Youth (SAFY) of SC and the North Carolina Philanthropy Conference. He received a BA from UNC Chapel Hill, where he was a Morehead Scholar, and an MBA from Queens University of Charlotte.



**Josh Jacobson,**  
*Director*

Josh Jacobson brings more than a decade of resource development experience and specializes in strategic positioning and tactical design. Josh spent five seasons as a director of major gifts with New York's Manhattan Theatre Club, where he raised \$3+ million annually to support the development of new work.

He also served as Senior Officer for Research at the Julliard School in New York City, and as Grants Manager at the Cultural Council of Greater Jacksonville. Josh graduated magna cum laude from Flagler College in St. Augustine, FL.



**Margaret Andrews,**  
*Associate Director*

Margaret joined PMA after enjoying three years at The Duke Endowment as both a Fellow and Program Associate. During her time at the Endowment, she worked in all four grant areas conducting site visits with current and potential clients and worked on special projects.

Margaret is originally from Lynchburg, V.A. and graduated from Duke University in 2006 with a self-designed degree that focused on social justice and nonprofits.



**Stephen Belenky,**  
*Consultant*

Stephen Belenky provides a successful track record in non-profit fundraising, marketing, strategic planning, public speaking and project management. Prior to PMA, Stephen served five years at United Way of Central Carolinas (UWCC) as Senior Development and Relationship Manager in Donor Relations and Young

Leadership Initiatives where he was responsible for all fundraising activity for the Mooresville-Lake Norman and Cabarrus County operations.

Stephen is a native of Greensboro, NC and graduated with honors from the College of Wooster in Wooster, OH, with a Bachelor's degree in Political Science and Philosophy.



**David Ibsen,**  
*Fellow*

While completing his Masters in Organizational Development from Queens University of Charlotte, David joined PMA as the firm's first fellow.

Prior to joining the PMA team, David worked in the development office at Levine Museum of the New South in Charlotte. Before transitioning to the nonprofit sector, David spent nine years in the financial industry in Atlanta, Ga. David is a 1999 graduate of Furman University.

## SCOPE OF SERVICES

**Strategic Planning** Successful organizations have a clear vision of where they are and where they want to be. It is important that your institution be effective in the short run with an eye on the long term purpose. Creating a foundation for success now and in the future is the essence of PMA's strategic planning services.

**Fundraising** A comprehensive plan for funding your organization and the resources to execute the plan are essential in this economic climate. PMA will help you inspire your staff and volunteers to create a comprehensive annual fund, capital and planned giving pipeline, ensuring your organization's mission can be supported.

**Board/Staff Development** Attracting, training and retaining staff, board members and volunteers is critical to your ability to survive. Having the right people in the right spots at the right time is a key element of organizational effectiveness. PMA will assist your organization to both identify your staffing/volunteer needs and navigate the search process without losing focus and momentum.

**Facilitation and Momentum** PMA's expert facilitation and presentation services will help you ensure that your next board/staff retreat or planning meeting is effective and motivating for all involved. By identifying and focusing on key stakeholders, you will speak more effectively about your organization and highlight the importance of involved, engaged volunteers and/or staff.

**Consolidation and Alliances** Economic conditions require that nonprofit organizations identify and explore alliances with other nonprofits addressing similar issues or populations in their communities. PMA can help you evaluate a merger or alliance to benefit both organizations and your clients.

**Foundation Support** Many private and family foundations are seeking better ways to implement their visions for philanthropy. Through their work with the David Belk Cannon Foundation, PMA helped the organization design a succession plan and refine their grantmaking.

**Campaign Management** Major campaigns are critical initiatives for any nonprofit organization, and PMA can professionally assess the viability of campaign goals, design and review collateral materials and communication systems and build a staff and volunteer infrastructure that will best support your campaign.