

# KATIE ALLAN ZOBEL

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## SENIOR LEADER

Initiative-taking senior leader with a consistent, successful track record developing sustainable programs and building goal-oriented, cross-functional teams. Skilled in strategic planning, fundraising, board governance and management, partnership building. Adept at fostering consensus, shared leadership, collaborative planning, and operational management. Clear and effective communicator. Deep expertise in nonprofit governance. Committed to ongoing learning and systems change required to advance equity, inclusion, and cultural competence.

## SELECTED ACHIEVEMENTS:

- Led a major strategic planning process and significant evolution of a complex organization while supporting the community during a global pandemic
- Increased assets from \$100M to \$250M and staff from 13 to 27 FTEs
- Developed new grant-making models in education and the arts focused on equity and measurable impact
- Doubled average annual gift revenue from \$7M to \$14M+
- Successfully closed 8-figure gifts and developed multi-year, multi-million dollar strategic partnerships
- launched a region-wide, 24-hour giving day that raised \$10M

## AREAS OF EXPERTISE

Strategic Planning | Leadership and Team Management | Fundraising and Resource Development | Financial Management | Non-Profit Governance and Board Management | Program Development | Communication | Partnership Building | Cultural Competence and Inclusion | Grantmaking | Microsoft Office | Google Products (Docs, Sheets, Slides) | Zoom

## PROFESSIONAL EXPERIENCE

**PROSPER & BLOOM LLC**, Amherst, MA

**Principal** (January 2023-Present)

- Delivering customized executive coaching for nonprofit leaders and their teams, especially those led by and/or serving historically marginalized communities.
- Developing shared governance models with training and coaching support for CEOs and board members; coaching for more effective board management; strategic planning; multi-year fundraising planning.

**COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS**, Springfield, MA

**Senior Advisor** (October-December 2022)

Provided transition coaching to interim leadership team, support to Foundation's Board Chair with focus on operations, fundraising, and institutional knowledge transfer.

**President and CEO** (2013-2022): Responsible for all aspects of a \$250M organization's performance, led strategic vision and planning, managed executive leadership team and Board

of Trustees, represented the foundation externally, responsible for prospect management of lead donors, gift planning and solicitations.

**VP for Philanthropic Services (2009-2013):** Raised \$7M annually through outright and planned gifts, oversaw donor services and communications, expanded referral base working with professional advisors, and managed high net worth donors.

**Director of Development (2005-2009):** Originated the Foundation's first job-share team, raised \$36.8M in five years, directed staff in planning annual meetings and workshops, and produced annual reports.

**INDEPENDENT CONSULTANT, Amherst, MA (2003-2005):**

Successfully raised \$1M through a community-led endowment campaign, managed volunteer committees, wrote appeals, conducted fundraising audits and developed fundraising plans.

**AMHERST COLLEGE, Amherst, MA (1994-2003)**

**Director of Special Projects:** Conducted research projects and produced recommendations for significant changes to College's fundraising efforts.

**Director of 25th Reunion Programs:** Managed fundraising activities, major gift prospects and volunteers, planned Reunion weekend events, and raised over \$2M per class.

**Director of Annual Giving:** Managed a successful annual fund program, raised \$6M+ from alumni and parents, and supervised a team of volunteers. Held national record for alumni participation.

**WGBY-PUBLIC TELEVISION, Springfield, MA (1991-1994)**

**Director of Annual Giving:** Managed a comprehensive annual giving program, developed direct mail plans and on-air fundraising campaigns, directed major donor programs.

**EDUCATION**

**Bachelor of Arts (BA) in English, *magna cum laude***

BOSTON COLLEGE, Chestnut Hill, MA

Chartered Advisor in Philanthropy designation (CAP®) from The American College

**PROFESSIONAL ORGANIZATIONS/AFFILIATIONS**

Court Appointed Special Advocate (CASA), Northampton, 2023-Present

Community Preservation Act Committee, Town of Amherst, 2020 – Present

Elms College Cynthia A. Lyons Ctr. for Equity in Urban Ed., Advisory Board, 2021 – Present

Florence Savings Bank Corporator, as of January 2024

Economic Development Council of Western Massachusetts, DEI Advisory Committee, Present

Economic Development Council of Western Massachusetts, Board Clerk, 2020 – 2023

Pioneer Valley Planning Commission, Plan for Progress Task Force, 2013 – 2022

Greater Springfield Regional Chamber of Commerce, Board Member, 2020 – 2022

Patient Care Excellent Committee, Cooley Dickinson Hospital, Northampton, 2019 – 2021

Amherst Education Foundation, Board of Directors, 2007 – 2012 (Chair, 2010-2012)

WGBY, Volunteer On-Air Fundraiser, 1994 – 2005