
Consultant Directory

July 2011



JOHN REX
ENDOWMENT

About this Directory

This directory includes area consultants that provide services to nonprofit agencies. Consultants were identified through agency contacts and public listings and invited to be listed in this directory. Only consultants who provided authorization are included here; further, we recognize that we may not have identified all consultants providing services in the area. Thus, this directory is not a complete list.

The John Rex Endowment does not screen listed consultants or verify the accuracy of information presented. Therefore, the John Rex Endowment cannot make any specific endorsements or recommendations.

To be added to this directory, to recommend a consultant to be included in this directory, to edit your directory listing or any other questions should be directed to Kate Shirah (kate@rexendowment.org).

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Anita Blomme, LLC – Anita Blomme

General Information

Date: July 28, 2010 E-mail: anita.blomme@minspring.com
 Website: _____ Phone: 919-673-9591
 Address: 1643 Sutton Drive; Raleigh, NC; 27605

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant was not invited to participate in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work given their expertise is limited to a particular area of specialty.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strategic Relationships	<p>Sally Edwards Consulting Sally Edwards 919-412-7200 sallyedwards@nc.rr.com</p> <p>WakeMed Health & Hospitals Raleigh, NC Amy Hutchinson Public Relations Manger 919-350-8309 ahutchinson@wakemed.org</p>
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Examples of organizational capacity building projects you have completed.

Relationship Building for Inaugural Community Fundraiser

- *Provided project leadership, strategic communications and relationship building for the recruitment of business partners who were crucial to the success of a nonprofit's inaugural awareness and fundraising event*
- *Served as initial and ongoing point of contact for supporting partners throughout event planning*
- *Supported client on site at event and acted as logistics liaison for supporting partners*
- *Accomplished goals and recruited 28 new business partners for an event which raised more than \$50,000 in the inaugural year*

Communications for Collaborative Program Launch

- *Developed and implemented a communications plan including media relations to assist multiple nonprofit agencies with the launch of a collaborative service in Wake County*
- *Provided counsel for program identity development which required integration and approval of various agencies*
- *Consulted regarding content for website and managed creation of initial collateral materials*
- *Planned, promoted and managed logistics for media event to launch program; increased program exposure through acquired news coverage including local newspaper and a national nonprofit news publication*

List any other areas of expertise relevant to organizational capacity building.

- *Identifying target key audiences which need to be engaged to build capacity*
- *Message development for effective organization or project-specific communication*
- *Counsel and management of awareness campaigns*
- *Planning, content and project management for improving websites, publications, and topic-specific or ongoing communications*

What other areas of expertise do you have outside of organizational capacity building?

Full range of public relations, communications and event planning services which are applicable to a variety of nonprofit goals

Current bio and client list included in Consultant Directory Supplemental Materials.

Armstrong McGuire & Associates, LLC – Bert Armstrong

General Information

Date: July 16, 2010

E-mail: barmstrong@amapag.com

Website: www.amapag.com

Phone: 919-926-7291

Address: PO Box 6485; Raleigh, NC; 27628

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
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Mission, Vision, and Strategy	SAFEchild, Raleigh, NC Marjorie Menestres, Executive Director NC Housing Coalition, Raleigh, NC Chris Estes, Executive Director Homes for Children, Banner Elk, NC Jim Swinkola, CEO Lucy Daniels Child Development Center, Cary, NC Don Rosenblitt, Director
Governance and Leadership	Action for Children, Raleigh, NC Barb Bradley, Executive Director NC Justice Center Melinda Lawrence, Executive Director
Resource Development	Urban Ministries of Wake County Anne Burke, Executive Director Habitat for Humanity of Wake County Nancy Jones, Director of Development & Communications Prevent Child Abuse NC Rosie Allen, President & CEO Christian Community in Action, Cary, NC Howard Manning, Executive Director Big Brothers Big Sisters of the Triangle Kim Breeden, CEO Peace College, Raleigh, NC Lauren Gerber, Director of Development Operations

Internal Operations and Management	YMCA of the Triangle Doug McMillan, CEO NC United Methodists Camp & Retreat Ministries, Raleigh, NC Mike Safley, Chair of the board Bobby Harris, Executive Director
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Examples of organizational capacity building projects you have completed.

Organizational assessment and completion of comprehensive strategic planning with board and staff leadership
Creation of annual, capital, and endowment fundraising plans
Executive Transition Management – supporting the transition in leadership and recruitment of new executive directors

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Board development
Executive coaching
Executive searches (nonprofit chief executives, development staff, and other senior level management positions)
Mission and vision development
Strategic planning
Development program audits
Creating annual and long range development (fundraising) plans
Internal campaign readiness assessments
Campaign feasibility studies
Campaign counsel

What other areas of expertise do you have outside of organizational capacity building?

Armstrong McGuire, LLC is a full-service consulting firm specializing in organizational planning, leadership development, executive recruitment, and fundraising counsel.

Principal and senior associate biographies are included in Consultant Directory Supplemental Materials.

Brainard Consulting LLC – Carol Brainard

General Information

Date: December 6, 2010

E-mail: carol@brainardconsulting.com

Website: www.brainardconsulting.com

Phone: 919-490-2074

Address: 2808 Montgomery Street, Durham, NC; 27705

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

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Comprehensive Organizational Assessment	ipas Chapel Hill, NC Anu Kumar Vice President, Communications and Development 919-960-5710 kumara@ipas.org		American Cleft Palate Craniofacial Association Chapel Hill, NC Nancy C. Smythe Executive Director, ACPA/CPF 919-933-9044 nsmythe@acpa-cpf.org					
Mission, Vision, and Strategy	ipas Chapel Hill, NC Anu Kumar Vice President, Communications and Development 919-960-5710 kumara@ipas.org		The Hill Center Sherry Maskel Director 919-489-7465 ext. 7575 smaskel@da.org					
Governance and Leadership	ipas Chapel Hill, NC Anu Kumar Vice President, Communications and Development 919-960-5710 kumara@ipas.org		The Broad Center Residency Oakland, California Pete Cordero Director, Resident Development 510-451-4448 pcordero@broadcenter.org					
Resource Development	ipas Chapel Hill, NC Anu Kumar Vice President, Communications and Development 919-960-5710 kumara@ipas.org		UNC - Institute of Government Chapel Hill, NC Pat Langelier (former) Associate Dean of Operations 919-962-0761 plangelier@fac.unc.edu					
Internal Operations and Management	ipas Chapel Hill, NC Anu Kumar Vice President, Communications and Development 919-960-5710 kumara@ipas.org		UNC - Institute of Government Chapel Hill, NC Pat Langelier (former) Associate Dean of Operations 919-962-0761 plangelier@fac.unc.edu					
	Triangle Organization Development Network Raleigh, NC Beth Minton, President 919-969-8939 beth@bethminton.com		Triangle Organization Development Network Raleigh, NC Beth Minton, President 919-969-8939 beth@bethminton.com					
	Passage Home Jeanne Tedrow Executive Director 919-834-0666 jeannedrow@yahoo.com							

Organizational Restructuring or Mergers	Oce Systems Boca Raton, FL Sheryl Pattek (former) VP of Marketing 305-500-3525 sheryl_pattek@ryder.com	Hewlett Packard Latin America Anna Lopez (former) Regional Director 305-607-8724 ana.x.lopez@oracle.com
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Examples of organizational capacity building projects you have completed.

1. Organizational Efficiency and Global Expansion

Background: An international non-profit received a multi-year grant effectively tripling the organization's revenue overnight. Committed to growing its field work impact on five continents, the organization faced immediate capacity-building challenges. Our client was seeking an organization development initiative with an anticipated 3-year timeframe to address broad areas of concern related to operational effectiveness, cross-functional innovation and teamwork, communication, results measurement, and global governance.

Assessment and Engagement: We conducted a Rapid Discovery Assessment including in-depth interviews with selected international staff and a high level analysis of key business processes. As a result of our findings and in keeping with the organizational culture, we designed four parallel tracks to pursue a broad-based, collaborative process for:

- *strategic alignment –prioritizing and clarifying strategic direction*
- *leadership development –executive and team coaching to refine roles and responsibilities and build global communication, management, and cross-functional skills*
- *business process reengineering – redesign of key processes and technology for planning and budgeting, innovation management, and fundraising/development*
- *performance improvement –organizational dashboard metrics and individual performance management*

Results: Focus on strategic priorities resulted in organizational entity restructuring to maximize opportunities for both programmatic and technology innovation. Leadership development, decision protocols, team agreements, and redesigned processes improved cross-functional communications and global operations, while metrics and performance management provided the foundation for greater accountability in an evidence-based working environment.

2. Administrative Systems Upgrade

An educational organization required updating of its entity-wide, administrative systems technology. Our role was to guide the process of assessing administrative system needs, recommending process and organizational improvements, preparing the technology request for proposal and conducting the vendor search. We partnered with the client-designated project manager to establish a collaborative, cross-functional change management team, develop a project charter and detailed plan, design and implement business process improvements including associated organizational roles and responsibilities, and prepare an implementation plan. The project resulted in the selection of a new vendor system which greatly increased the quality, capability and efficiency of administrative operations throughout the organization.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Brainard Consulting guides organizations through periods of significant growth and change: new offerings and markets, global expansion, organizational restructuring, quality, technology and performance improvement.

Our clients are mission-driven and committed to results. They know that nothing stays the same for long. Continued success depends on rapid response, sound decisions and confident execution.

As consultants, we partner with clients to meet each new challenge, helping them create an organizational mindset where change for improvement becomes business as usual. Thoughtful leaders set direction and broad-based collaboration paves the way to results. Our services include:

- Strategic Focus and Alignment: prioritizing what matters most, shaping the future with clear vision and a shared agenda*
- Leadership and Teamwork: courageous leadership and "can-do" teams, creating a culture of trust, accountability, collaboration and service*
- Organizational Effectiveness: flexible, smart business processes and systems.... scalable and ready for change*
- Measurable Outcomes: customer-driven with a passion for quality, innovation, and continuous improvement*

We are guided in our capacity-building work by several organizational frameworks and models, including our own PACE Methodology. For more information, please see our website at www.brainardconsulting.com

What other areas of expertise do you have outside of organizational capacity building?

- *Consulting services to guide organizational growth and change*
- *Executive coaching of individual and teams*
- *Facilitation*
- *Leadership and management development workshops*

Current bio, resume and client list are included in Consultant Directory Supplemental Materials.

B. Y. Consulting – Bauback Yeganeh

General Information

Date: June 17, 2011

E-mail: by@byconsulting.com

Website: www.byconsulting.com

Phone: _____

Address: 8025 Goldenrain Way; Raleigh, NC; 27612

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

Check Areas of Specialty:	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

References are provided upon specific request.

Examples of organizational capacity building projects you have completed.

7-year Ongoing Strategy Implementation and Organizational Change Consulting. Continuous assessment, training, and strategy work to develop competencies at social work organization in one of the United State's poorest cities. This involved close engagement with leaders to understand strengths and opportunities for development throughout the organization, bi-annual large group gatherings to assess strategic goals, designing and implementing programs to develop necessary competencies, and one-on-one coaching.

Management Development Curriculum Program. Collaborated with program manager and core team of senior consultants to develop and ensure successful facilitation of 12-course program that helped produce high-level leadership. Designed and implemented very successful Social Intelligence program for high potential leaders.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Organizational effectiveness, leadership development, team effectiveness, culture change, strategy, strategy execution

What other areas of expertise do you have outside of organizational capacity building?

Creating coaching leaders who excel at developing direct reports and nurturing talent pipelines, creating effective negotiators, developing emotional and social intelligence throughout organizations, creating effective conversations/communication practices, creating mindful leaders – intentional and aware of leadership impact, creating stronger relationships with clients/customers/stakeholders, large scale events to foster stakeholder input toward strategy, strategy execution assessment and improvement

Current CV and bio included in Consultant Directory Supplemental Materials.

Cameron Graham Consulting – Cameron Graham

General Information

Date: July 11, 2011

E-mail: cameron@camerongrahamconsulting.com

Website: www.camerongrahamconsulting.com

Phone: 919-623-4722

Address: 201 Sampson Street; Raleigh, NC; 27609

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant was not invited to participate in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work given their expertise is limited to two particular areas of specialty.

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Mission, Vision, and Strategy	Dr. Laura Gerald Former ED of Health and Wellness Trust Fund Laurageraldmd@aol.com Junior League of Raleigh Anna Choi AChoi@allen-pinnix.com Mary Blake m2blake@gmail.com
Governance and Leadership	Dr. Laura Gerald Former ED of Health and Wellness Trust Fund Laurageraldmd@aol.com BCBSNC Foundation Jen MacDougall Jennifer.MacDougall@bcbsncfoundation.org

Examples of organizational capacity building projects you have completed.

I helped to build a framework, mission, vision and curriculum for a leadership development program for non-profits in Wake County called the Capital Leadership Initiative.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

What other areas of expertise do you have outside of organizational capacity building?

Health and Wellness, Government Relations, Strategic Partnerships

Current resume is included in Consultant Directory Supplemental Materials.

Capability Company – Sherry Heuser

General Information

Date: July 14, 2010

E-mail: sherry@capabilitycompany.com

Website: http://www.capabilitycompany.com

Phone: 919-791-3700

Address: 8300 Clarks Branch Drive; Raleigh, NC; 27613

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant was not invited to participate in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work given their expertise is limited to two particular areas of specialty.

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Governance and Leadership	<p>Durham's Partnership for Children Durham, NC Marsha Basloe Executive Director (919) 403-6960 marsha@dpfc.org</p> <p>Make-a-Wish Foundation of Eastern North Carolina Morrisville, NC Ziva Raney President and CEO (919) 821-7111 zraney@eastncwish.org</p>
Internal Operations and Management	<p>North Carolina Coastal Land Trust Wilmington, NC Camilla Herlevich Executive Director (910) 790-4524 camilla@coastallandtrust.org</p> <p>North Carolina Symphony Raleigh, NC David Worters President and CEO (919) 733-2750 dworters@ncsymphony.org</p>

Examples of organizational capacity building projects you have completed.

Developed and managed full search process for senior fundraising position; partnered with organization to support their search for a new Executive Director.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Focus of the firm is on search services and consultation only.

What other areas of expertise do you have outside of organizational capacity building?

Grants management, program development and management, board-staff relations, board roles and responsibilities, volunteer coordination, family support initiatives.

Current bio, resume and client list are included in Consultant Directory Supplemental Materials.

Capital Development Services – Allan Burrows

General Information

Date: July 21, 2010

E-mail: aburrows@capdev.com

Website: http://www.capdev.com/

Phone: 336-747-0133 x855

Address: 315 N. Spruce St.; Suite 215A; Winston-Salem, NC; 27101

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

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Mission, Vision, and Strategy	<p>John Avery Boys and Girls Club Trey Gilmore Board Chair PO Box 446, Durham, NC 27701 http://www.johnavery.org/ (919) 687-4517</p> <p>Elizabethan Gardens Horace Whitfield Executive Director 1411 National Park Drive, Manteo, NC 27954 hwhitfield@elizabethangardens.org seekrestatobx@yahoo.com (252) 473-3261</p>
Governance and Leadership	<p>Foundation for Cancer Research and Education Joanne Mahanes PO Box 746, Earlysville, VA 22936 (434) 220-4539 jm.fcre@earthlink.net</p> <p>NC Center for Nonprofits (annual conferences) Trisha Lester Vice President 1110 Navaho Drive, Suite 200, Raleigh, NC 27609-7322 tleston@ncnonprofits.org www.ncnonprofits.org (919) 790-1555</p>
Resource Development	<p>Nature Conservancy Jim McDuffie Director of Philanthropy One University Place, 4705 University Drive, Suite 290, Durham, NC 27707 jmcduffie@tnc.org www.nature.org (919) 403-8558 x1004</p> <p>NC Museum of Natural Sciences Bonnie Smith Director of Development PO Box 26298, 11 W. Jones St., Raleigh, NC 27601 bonnie.smith@ncmail.net www.naturalsciences.org (919) 733-7450</p>

Strategic Relationships	<p>Dore Academy Roberta Smith Head of School 1727 Providence Road, Charlotte, NC 28207, rsmith@doreacademy.org www.doreacademy.org (704)365-5490 x22</p> <p>Institute for Emerging Issues Anita Brown-Graham Director, Campus Box 7406, Raleigh, NC 27695-7406 arbrowng@ncsu.edu http://ncsu.edu/iei (919) 515-7741</p>
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Examples of organizational capacity building projects you have completed.

Please visit www.capdev.com and see our Client case studies for more detail.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Our stated goal in working with nonprofit organizations of all types across the Southeast has always been to help build their capacity for sustainable fund development. We do this with a focused team approach, centered around the basics of building a strong case for support; building the leader and donor bases, and building the needed infrastructure to achieve goals. Reaching specific financial goals is secondary for us to helping build a stronger organization overall so that our clients are better able to maintain what they have set out to build in their campaign efforts.

What other areas of expertise do you have outside of organizational capacity building?

Capital Development Services also has an executive search services division, helping nonprofits find successful executive leadership.

Current client list is included in Consultant Directory Supplemental Materials.

Catalyst Consulting Services, LLC – Al Huntoon

General Information

Date: July 30, 2010

E-mail: Al.Huntoon@catalystconsulting.org

Website: http://catalystconsulting.org

Phone: 919-598-6935

Address: 108 Galax Lane, Suite B1; Durham, NC; 27703

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

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Mission, Vision, and Strategy	<p>Art Therapy Institute Durham, NC Ilene Sperling MA, LPC, ATR Clinical Director (919) 225-5124 isperling@ncati.org</p> <p>Arc of Durham County Durham NC Jane Johnson-Chavis Executive Director (919) 493-8141 janejc@verizon.net</p>
Program Delivery and Impact	<p>Urban Investment Strategies Center, Frank Hawkins Kenan Institute of Private Enterprise, UNC Kenan-Flagler Business School Chapel Hill, NC James H. Johnson, Jr. Director, (919) 962-8201 JohnsonJ@kenan-flagler.unc.edu</p> <p>Center for the Advancement of Social Entrepreneurship, Duke University Fuqua School of Business Durham, NC Matthew T.A. Nash CASE Managing Director (919) 660-7791 mnash@duke.edu</p>

Examples of organizational capacity building projects you have completed.

Recently I worked closely with a local community based organization to facilitate a comprehensive strategic planning process; the organization was compelled to reconsider its priorities due to changing external conditions. This included assessing the organization's external and internal environments, completing a SWOT analysis, helping the Board of Directors and key staff to redefine its purposes, formulate a detailed description of how they will attain their goals with a clear a definition of success and articulate a commitment to change. An innovative and practical approach that I incorporated into the process created a focus on behavioral change – what individual and organizational behaviors would have to be changed or outright abandoned and what behaviors need to replace these. This approach helped to make the proposed plan very concrete and the organization was reenergized by the prospect of realizing its new goals and objectives.

For another organization, I conducted a ½ day alternative to traditional strategic planning process. I employed an accelerated, intensive planning method that focused on successfully implementing the organization's mission by operationalizing the organization's

values. I was able to limit the amount of time the Board of Directors had to invest in the process as well as minimizing the cost of the planning effort while developing a practical planning portfolio.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

I have expertise in the area of social enterprise development. This includes conducting readiness and feasibility assessments as well as concept development and business planning.

What other areas of expertise do you have outside of organizational capacity building?

I also have experience with designing and implementing executive leadership development programs with a focus on facilitating high performance and increased leadership capacity in the public sector.

Current resume is included in Consultant Directory Supplemental Materials.

Clear Connections LLC – Mary Beth Loucks-Sorrell

General Information

Date: July 17, 2010

E-mail: marybeth@clearconnect.org

Website: n/a

Phone: 919-452-1696

Address: 2309 Summit Drive; Hillsborough, NC; 27278

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

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Comprehensive Organizational Assessment	<p>YWCA of the Greater Triangle Raleigh, NC Folami Bandele Executive Director 919.828.3205 fbandele@ywcatriangle.org</p> <p>Hawkeye Indian Cultural Center Red Springs, NC Gwen Locklear Executive Director 910.843.9484 ladylumbree@aol.com</p>
Mission, Vision, and Strategy	<p>North Carolina American Indian Health Board Statewide Nonprofit Robin Cummings Board Chair 910.315.4242 Rcummings3@nc.rr.com</p> <p>NARAL NC Statewide Nonprofit Mike Crum Founder, Board Member 919.451.8936 mike@tmccconsultingservices.com</p>
Governance and Leadership	<p>Youth Empowered Solutions Statewide Nonprofit Bronwyn Lucas Executive Director 919.878.8777 Bronwyn@youthempoweredolutions.org</p> <p>YWCA of the Greater Triangle Raleigh, NC Folami Bandele Executive Director 919.828.3205 fbandele@ywcatriangle.org</p>

Resource Development	Robeson County Substance Abuse Coalition Lumberton, NC Lekisha Hammonds Partnership Coordinator 910.671.5596 Hammon03@srmc.org Council of Churches Statewide Nonprofit Willona Stallings Program Director 919.828.6501 willona@nccouncilofchurches.org
Strategic Relationships	Foundation for Nursing Excellence Statewide Nonprofit Polly Johnson President and CEO 919.810.6754 Polly.johnson@ffne.org Yellow Dog Creative Triangle For Profit Julie Schmidt Owner 919.819.8081 Julie@fetchyellowdog.com
Program Delivery and Impact	Crisis Control Ministry Winston-Salem Nonprofit Margaret Elliott Executive Director 336.724.7875 melliott@crisiscontrol.org Foundation for Nursing Excellence Statewide Nonprofit Polly Johnson President and CEO 919.810.6754 Polly.johnson@ffne.org

Examples of organizational capacity building projects you have completed.

Example #1

Created a fundraising capacity building initiative for over 30 nonprofits across the United States to leverage best practices of similar organizations and create efficient system of technical assistance delivery. Specifics of the project included monthly conference calls and one on one assessment of state specific funding issues. Experts on how to determine the best funding software and launching major donor initiatives were engaged to provide information, training and one on one support to ensure success.

Example #2

Provided comprehensive analysis of key areas of the organization through analysis of financial statements, interviews with stakeholders, board and staff members and interaction with clients served by agency. Summarized materials for board presentation and assisted organization in prioritizing next steps based on need, energy of board and staff around specific topics and external opportunities such as available resources and current policy discussions.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

For over 10 years I have been learning and applying an understanding of outcomes to every project or body of work I am engaged in. Use of an outcomes framework clarifies the direction of the work or project of a nonprofit and increases energy of board and staff during the process. My value in applying outcomes is my realistic approach having applied them myself as a nonprofit executive director and an understanding from the Funder perspective in how to integrate outcomes successfully.

What other areas of expertise do you have outside of organizational capacity building?

The main focus of my work prior to starting Clear Connections, LLC was focused on ending violence against women. Any issues related to domestic violence is an area of expertise and a welcome addition to my work.

Current resume with client list is included in Consultant Directory Supplemental Materials.

Creative Philanthropy – Beth Briggs

General Information

Date: July 7, 2010

E-mail: BBriggs2@aol.com

Website: _____

Phone: 919-786-4220

Address: 4004 Barrett Square, Suite 203; Raleigh, NC; 27609

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Mission, Vision, and Strategy	Interact Raleigh, NC Kathy Johnson NC Community Foundation Raleigh, NC Jennifer Tolle-Whiteside Harbor, Inc Smithfield, NC Keri Christensen
Governance and Leadership	Brady Education Foundation Liz Pugello Wake Health Services Inc. Raleigh, NC Penny Washington Inter-Faith Food Shuttle Raleigh, NC Jill Bullard
Resource Development	Served as President of NC Public Television during a successful \$8 million capital campaign Served as President of Capitol Consortium and conducted multiple capital campaigns for clients including Meredith College, Planned Parenthood, and Triangle Hospice
Strategic Relationships	The Warner Foundation Betty Craven Brady Education Foundation Liz Pugello
Internal Operations and Mangement	Girls on the Run of the Triangle Kelly Hurter Interact Family Safety and Empowerment Center Adam Hartzell (former Executive)
Program Delivery and Impact	References not provided.
Organizational Restructuring or Mergers	References not provided.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Communications

Comprehensive publications, media, and public speaking experience: presenting at workshops and conferences, presiding at board meetings, and making television appearances; writing and editing publications; representing agencies to philanthropic organizations. Knowledgeable of video and radio production, marketing programs, research methods, governmental and media relations. Have developed and maintained positive reputation as creative thinker and problem-solver, with broad and established network among foundation, civic group, professional association, government, and nonprofit leaders.

Succession Planning

Creative Philanthropy offers a turn-key operation for succession planning and selection of executive professionals in the most efficient and effective manner. Successful completion of the process strengthens the organization with clarity in vision and steadiness of purpose for new leadership based upon criteria needed for the next eight years. The process includes articulation of the criteria for the next Executive Director by the board and staff; preparation of job descriptions; candidate criteria evaluation process; initial candidate screening; interviews and reference checks.

Board Training on Roles and Responsibilities

Successful organizations are lead by boards that understand and accept their roles and responsibilities. The challenge is to make sure they are investing their time, talent and treasure in the best manner. Creative Philanthropy helps boards develop their board roles and responsibilities and evaluate their performance based upon standard board criteria. We identify skills and talents of the board and create a strategy to create the board necessary to lead the organization forward. Annual performance evaluations enable members to identify specific skill sets and perpetuate a healthy board.

What other areas of expertise do you have outside of organizational capacity building?

Philanthropic Advisor - Grants-Making and Foundation Operations

In-depth understanding of the grants-seeking and grants-making process: reviewing and screening grant applications, researching applicants and their programs, conducting site visits, interviews, and project evaluations; preparing and analyzing budgets, administering fiscal policies and procedures, and monitoring investments; designing and conducting needs assessments and program evaluations. Able to synthesize complex information and concisely present it to grants making bodies.

Current resume and client list are included in Consultant Directory Supplemental Materials.

Debby Warren Consulting – Debby Warren

General Information

Date: August 11, 2010

E-mail: debbywarren@earthlink.net

Website: _____

Phone: 919-851-9757

Address: 5132 Theys Road; Raleigh, NC; 27606

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Comprehensive Organizational Assessment	Oxfam America Boston, MA Ajulo Othow, Assistant Director Aothow@oxfamamerica.org 617-728-2489
Mission, Vision, and Strategy	Mary Reynolds Babcock Foundation Winston-Salem, NC Sandra Mikush, Associate Director 336-748-9222 smikush@mrbf.org
Governance and Leadership	Hart Leadership Program, Duke University Durham, NC Alma Blount, Director 919-613-7323 blt@duke.edu
Resource Development	National Housing Trust Washington, DC Michael Bodaken, President 202-333-8931 ext. 111 mbodaken@nhtinc.org
Strategic Relationships	NC Community Development Initiative Raleigh, NC Tara Kenchen, Chief Operating Officer 919-828-5655 tkenchen@ncinitiative.org
Program Delivery and Impact	MDC Chapel Hill, NC David Dodson 919-968-4531 ddodson@mdcinc.org

Examples of organizational capacity building projects you have completed.

1. *Helped a statewide advocacy organization in NC with board development and strategic planning. This is a volunteer led organization – no staff.*
2. *Helped an African-American alumni association develop a fundraising strategy and staffing plan.*

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Executive transition, Grassroots engagement, Policy advocacy

What other areas of expertise do you have outside of organizational capacity building?

Community economic development, Rural development, Community philanthropy

Current resume and client list are included in Consultant Directory Supplemental Materials.

Don Wells Consulting, Inc. – Don Wells

General Information

Date: July 21, 2010

E-mail: donwellsconsulting@yahoo.com

Website: _____

Phone: 919-732-1989

Address: 8737 Allison Road; Cedar Grove, NC; 27231

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Mission, Vision, and Strategy	Dr. Josiah Whitehead, Chair of Diversity Board jrwhitehead13@gmail.com Dr. Brenda Jamerson, Faculty member of CUSOP and Board member jamerson@campbell.edu Polly Johnson, RN, MSN, FAAN, President and CEO of Foundation polly.johnson@ffne.org Dr. Beverly Foster, Board Chair bbfooster@email.unc.edu
Governance and Leadership	Mark Kuhn, Board Chair MARK3233@aol.com Mike Hanas, Headmaster mhanas@cfsnc.org Dr. Dean Urban, Faculty Advisor to DD Fellows deanu@duke.edu Karen Kirchoff, Career Counselor at Nicholas School kgki@duke.edu
Internal Operations and Management	Barbara Jesse-Black, ED bjblack@bellsouth.net Valecia Jones, Ops Mgr. valeciaj@bellsouth.net Sandy Ogburn, Admin. Dir. sogburn@AchieveDurham.org Gayle Erdheim, Academic Dir. gerdheim@AchieveDurham.org
Organizational Restructuring or Mergers	Dr. Peggy Terhune, Executive Director PTerhune@ArcOfStanlyNC.org Jackie McGowen, Exec. Asst. jmcgowen@ArcOfStanlyNC.org

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Have conducted many organization assessments, led many strategic planning efforts, helped organizations move from local to regional to statewide, have done staff training and many, many Board Retreats on many topics.

What other areas of expertise do you have outside of organizational capacity building?

Coaching, conflict resolution, visioning sessions, leadership development, public speaking training, achieving balance, the care and feeding of grandchildren.

Current resume and client list are included in Consultant Directory Supplemental Materials.

Eagle Eye Management – Latanya DuBois

General Information

Date: July 20, 2010

E-mail: eagleeyemanagement@yahoo.com

Website: www.EagleEyeManagement.webs.com

Phone: 919-995-9547

Address: 7325 Knightdale Boulevard; Suite D, Knightdale, NC; 27545

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Comprehensive Organizational Assessment	<p>About Face II, Inc. Garner, North Carolina Robin Flow Executive Director 919-332-0996 aboutfacetwo@hotmail.com</p> <p>Haitian Centers Council, Inc Brooklyn, New York Elizabeth Monzon Dr. Pierre Louis Director of Finance Program Director 919-940-2200 mcpierre-louis@hccinc.org emonzon@hccinc.org</p>	<p>Bronx Community Pride Center Bronx, New York Lisa Winters Executive Director 917-617-1669</p>
Mission, Vision, and Strategy	<p>About Face II, Inc. Garner, North Carolina Robin Flow Executive Director 919-332-0996 aboutfacetwo@hotmail.com</p> <p>Haitian Centers Council, Inc Brooklyn, New York Elizabeth Monzon Dr. Pierre Louis Director of Finance Program Director 919-940-2200 mcpierre-louis@hccinc.org emonzon@hccinc.org</p>	<p>Bronx Community Pride Center Bronx, New York Lisa Winters Executive Director 917-617-1669</p> <p>Vaughn Taylor Former Deputy Executive Director 1-708-261-8705 nyikaxian@gmail.com</p>
Internal Operations and Management	<p>About Face II, Inc. Garner, North Carolina Robin Flow Executive Director 919-332-0996 aboutfacetwo@hotmail.com</p> <p>Haitian Centers Council, Inc Brooklyn, New York Elizabeth Monzon Dr. Pierre Louis Director of Finance Program Director 919-940-2200 mcpierre-louis@hccinc.org emonzon@hccinc.org</p>	<p>Vaughn Taylor Former Deputy Executive Director 1-708-261-8705 nyikaxian@gmail.com</p>

Program Delivery and Impact	About Face II, Inc. Garner, North Carolina Robin Flow Executive Director 919-332-0996 aboutfacetwo@hotmail.com	Alianza Dominicana, Inc. New York, New York Wanda Cuello Program Director 917-258-3820 Wanda.cuello@alianzaonline.org
	National Association of People Living with AIDS (NAPWA) Silver Spring, Maryland Vanessa Johnson Executive Vice President 240-247-1016 vjohnson@napwa.org	Bronx Community Pride Center Bronx, New York Lisa Winters Executive Director 917-617-1669
	Haitian Centers Council, Inc Brooklyn, New York Elizabeth Monzon Dr. Pierre Louis Director of Finance Program Director 919-940-2200 mcpierre-louis@hccinc.org emonzon@hccinc.org	Vaughn Taylor Former Deputy Executive Director 1-708-261-8705 nyikaxian@gmail.com

Examples of organizational capacity building projects you have completed.

Comprehensive Organizational Assessment- Eagle Eye Management (EEM) worked with Company Z to complete an agency assessment. Upon completion of the full assessment EEM provided a written report of findings and recommendations with a plan of action for key staff members. EEM provides ongoing (usually weekly to monthly) on site hands on visits to ensure that the action plan was being completed. When barriers occurred, EEM was instrumental in identifying new plans of action, assisting staff with necessary changes and completing funder reports. EEM also assisted the agency with identifying training needs (some trainings were offered by EEM staff), board development needs, brainstorming sessions for problem solving and recording improvement in program delivery. At the end of the capacity building project the agency had improved their ability to monitor their programs progress. They were able to conduct productive meetings with real time improvement outcomes.

Program Delivery and Impact- Eagle Eye Management (EEM) worked with Company X to complete an agency assessment. Upon completion of the assessment EEM assisted the agency with developing and implementing their program. EEM created the quality assurance and evaluation plan for the program and provided on going on site visits to assess program performance. EEM created data collection tools and plans to measure program performance. At the end of the capacity building project the agency was able to accurately identify areas for improvement in their programs and reach projected goals and objectives. Staff is able to describe and implement their program confidently, achieved intended goals and present program services to all stakeholders. Additionally, EEM developed an annual report to use for future funders.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Group Facilitation Training, Working with 'Hard to Reach' Populations, Grant writing Assistance, Collecting and using Program and Client Level Data training

What other areas of expertise do you have outside of organizational capacity building?

Motivational Speaking, Staff Morale, Life/Business Coaching, Event Planning, Retreat Planning and Development, Staff Appreciation Development, Program Design and Development, Curriculum Development

Current resume and client list are included in Consultant Directory Supplemental Materials.

Eno River Consulting – Jane Cox

General Information

Date: July 8, 2010

E-mail: janefcox@gmail.com

Website: http://www.enoriverconsulting.org/

Phone: 919-971-8303

Address: 903 W. Johnson St.; Raleigh, NC; 27605

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Mission, Vision, and Strategy	Angela Georgallis, American Red Cross Triangle Chapter Director of Financial Development Raleigh, NC (919) 861-1662 Gwen Locklear, Executive Director, Hawkeye Indian Cultural Center Red Springs, NC (910) 843-9484
Governance and Leadership	Rev. Phillip Jackson, Executive Director, New Beginnings Outreach Durham, NC (919) 724-0871 Yevonne Brannon, Board Chair, WakeUP Wake County, Raleigh, NC (919) 515-1300
Resource Development	Rev. Dr. Alan Rice, Executive Director, RFD CDC, N. Wilkesboro, NC (336) 239-1526 Angela Georgallis, American Red Cross Triangle Chapter Director of Financial Development Raleigh, NC (919) 861-1662
Strategic Relationships	Folami Bandele, Executive Director, YWCA of the Greater Triangle Raleigh, NC (919) 828-3205 Rev. Dr. Alan Rice, Executive Director, RFD CDC, N. Wilkesboro, NC (336) 239-1526
Internal Operations and Management	Yevonne Brannon, Board Chair, WakeUP Wake County Raleigh, NC (919) 515-1300 Rev. Phillip Jackson, Executive Director, New Beginnings Outreach Durham, NC (919) 724-0871
Program Delivery and Impact	Folami Bandele, Executive Director, YWCA of the Greater Triangle Raleigh, NC (919) 828-3205 Jill Bullard, Executive Director, Inter-Faith Food Shuttle Raleigh, NC (919) 250-0043

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Branding; Capacity Building; Coalition Building; Connected Leadership; Decision-Making; Deciding What to Let Go and What to Keep Under Control; Delegation; Engagement of External and Internal Stakeholders; Executive Leadership; Exponential Growth; Facilitation; Fundraising; Grassroots Organizing; High-Performance Internal and External Teams; Intra-Sector Relationships; Leadership Development with Individuals, Front-Line Managers, the Executive Team, Board Members and the Community; Marketing; Navigating Ambiguity; Negotiation; Organizational Alignment; Problem- Solving; Scaling to Meet Increased Demand; Stakeholder Management; Strategic Partnerships; Strategic Thinking; Transformative Change; Women & Leadership

What other areas of expertise do you have outside of organizational capacity building?

Public speaking and gender communications

Current resume and client list are included in Consultant Directory Supplemental Materials.

Executive Service Corps of the Greater Triangle – Trudy Smith

General Information

Date: August 17, 2010

E-mail: escgt@mindspring.com

Website: http://www.esctrangle.org/

Phone: 919-681-3536

Address: P.O. Box 51152; Durham, NC; 27717

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comprehensive Organizational Assessment	<p>The Arc of Wake County Raleigh, NC Steve Strom Executive Director 919-832-2660 steve.strom@arcwake.org</p> <p>Lucy Daniels Center for Early Childhood Raleigh, NC Joyce Watkins King Director of Development 919.677.1400 x120 jwking@lucydanielscenter.org</p>
Mission, Vision, and Strategy	<p>Council for Senior Citizens Durham, NC Gail Souare Executive Director 919-688-8247 gsouare@councilseniorcitizens.org</p> <p>Durham Crisis Response Center Durham, NC Aurelia Sands-Belle Executive Director 919-403--9425 abelle@durhamcrisisresponse.org</p>
Governance and Leadership	<p>Casa Esperanza Montessori Charter School Raleigh, NC Paula Bickley Board Chair Direct Phone 919.459.4935 PBickley@biologicstoday.com</p> <p>Meals on Wheels (Wake) Raleigh, NC Alan Winstead Executive Director 919-833-1749 alan@wakemow.org</p>

Resource Development	Durham At Risk Youth Collaborative Durham, NC Jim Barbee Executive Director 919-682-3000 (office) Jim.Barbee@dpsnc.net
	Kidzu Children's Museum Chapel Hill, NC Jon Mills Founder No Phone calls, please jonbmills@aol.com
	Governor's Institute on Alcohol and Substance Abuse Raleigh, NC Sara McEwen Executive Director 919-990-9559 x4108 sara.mcewen@governorsinstitute.org

Examples of organizational capacity building projects you have completed.

1. *In 2009 a team of five ESC consultants conducted a Comprehensive Organizational Assessment (COA) for a nonprofit which serves children in Wake County over a 3 month period of time to assess the areas of the agency's strengths and weaknesses. The final report contained recommendations specific to the areas of review. These recommendations included a need for the organization to significantly refresh their Strategic Plan or create a new one. In either case; financial, fundraising and communications plans should be developed as a part of the effort. Estimates of current and future staffing needs should be included. Each of the separate reports included recommendations of needs that should be addressed by a new Strategic Plan. As complicated as it is, a succession plan needed to be developed, agreed upon by the Board and put in place. Since it is unlikely that the future Executive Director will fill all of the roles that the current ED currently does, the plan could consider grooming one of the staff for partial responsibility. Finally, ESC recommended that the Board activate a Nominating Committee. Nominating committees are very important in sustaining a board's membership and leadership. The committee should develop a process for recruiting, screening, and orienting potential new members. 2010 Update: This organization has taken our recommendations seriously and is following through on prescribed action steps.*

2. *In 2009 a team of five ESC consultants conducted a COA for another youth-oriented nonprofit over a 2 month period of time to assess the areas of the agency's strengths and weaknesses.*

ESC conducted the assessment in December of 2009 and January of 2010 through a series of interviews and reviews of internal documents. The CEO selected the staff and Board members to be interviewed based on their responsibilities for the areas that it had asked ESC to investigate. ESC selected consultants with the appropriate backgrounds and experience in these categories that were identified in the ESC Organizational Assessment Program Review Guide:

<i>Financial Management</i>	<i>Fund Development</i>
<i>Board Development</i>	<i>Human Resources</i>
<i>Internal Communications</i>	<i>Communications and Public Relations</i>
<i>Strategy and Structure</i>	<i>Volunteers</i>

The final report contained recommendations specific to the areas of review. Specifically, ESC recommended that a Financial Management task force be created to address critical cash flow and fundraising concerns. For the near term, ESC recommended that the organization focus additional resources on Information Technology and, Volunteer Recruitment and that the HR management of the agency be centralized. Finally, ESC recommended that the agency's Board commit to a formal plan for recruiting and developing new Board members, followed by the need for a new Strategic Plan in the next 12-18 months.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Financial assessment, fundraising basics for board and staff, communications/messaging

What other areas of expertise do you have outside of organizational capacity building?

Client list and staff biographies are included in Consultant Directory Supplemental Materials.

Giving Leadership Opportunity, Inc. – Amy Etheridge

General Information

Date: July 14, 2010

E-mail: amy@GoToGLO.com

Website: http://www.gotoglo.com/

Phone: 919-521-5776

Address: 105 Fenner Lane, Raleigh, NC 27603

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comprehensive Organizational Assessment	NC Gives, Raleigh, NC Donna Chavis, Executive Director 919.256.6908, Donna.chavis@ncgives.org Southern Documentary Fund, Durham, NC Diana Newton, Board Chair dnewton1@nc.rr.com
Governance and Leadership	PLM Families Together, Raleigh, NC Laura Benson, Executive Director 919.606.9415, Laura.Benson@lfscarolinas.org Southern Documentary Fund, Durham, NC Diana Newton, Board Chair dnewton1@nc.rr.com
Resource Development	Southern Documentary Fund, Durham, NC Diana Newton, Board Chair dnewton1@nc.rr.com NC Biotechnology Center, RTP, NC Christy Russell, VP Govt. & State Relations 919-785-1304 ext. 209 crussell@ncabr.org
Internal Operations and Management	Southern Documentary Fund, Durham, NC Diana Newton, Board Chair dnewton1@nc.rr.com Food Bank of Central & Eastern NC, Brenda Peterson, Manager of Corporate Giving brendabpeterson@gmail.com or 919-862-6023

Examples of organizational capacity building projects you have completed.

A) Through multiple work sessions, guided activities and discussion for staff to discover the new big picture for the organization as it transitions through the business cycle from start-up to "adolescent". In advance of facilitating individual work plans based on identified strategic direction, walked staff through the process of analyzing programs and services to determine mission impact and mission match AND program costs and potential revenues.

B) Working with staff and board, developed inaugural operational guidelines for administrative and fund development functions to establish procedures and organize systems.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Analysis and interpretation of donor database to identify and qualify prospects; fund development and campaign planning, strategizing and implementation

What other areas of expertise do you have outside of organizational capacity building?

Core planning around mission and vision; interim leadership, direction, stability and staff supervision during candidate searches; fund development systems and planning

Current resume and client list are included in Consultant Directory Supplemental Materials.

The INS Group – Ruth Peebles

General Information

Date: July 20, 2010

E-mail: rpeebles@theinsgroup.com

Website: www.theinsgroup.com

Phone: 919-266-3072

Address: P O Box 20575; Raleigh, NC; 27619

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comprehensive Organizational Assessment	<p>NCAAHPERD Raleigh, North Carolina Ron Morrow, EdD Executive Director 888-840-6500 ROMORROW@aol.com</p> <p>Judy Martino Director of Special Programs/Grants 919-833-1985 NCSPARK1@aol.com</p> <p>Community Partnerships, Inc. Raleigh, North Carolina Nikki Smith Director of Communications & Donor Relations 919-781-3616, ext. 250 nsmith@Compart.org</p>	<p>Riley Hill Family Life Center Wendell, North Carolina Evelyn Lucas Office Manager 919-365-7899 elucas30@bellsouth.net</p> <p>Sonya Jones Board Chair 919-217-8614 syjones@mindspring.com</p>
Mission, Vision, and Strategy	<p>Postpartum Education and Support, Inc. Raleigh, North Carolina Anne Wimer Executive Director 919-434-5986 awimer@nc.rr.com</p> <p>Housing for New Hope & 10-Year Plan to End Homelessness Durham, North Carolina Terry Allebaugh Executive Director 919-489-6282 terry@housingfornewhope.org</p> <p>Hispanic Cultural Center of Charlotte Charlotte, North Carolina Claudia Farnandez Board Member 704-330-4853 Claudia.Farnandez@cpcc.edu</p>	<p>Wilmington Health Access for Teens Wilmington, North Carolina Tay Keong Tan, PhD Former Executive Director for Wilmington Health Access for Teens 910-452-2997 taykeong@gmail.com</p> <p>Help, Incorporated: Center Against Violence Wentworth, North Carolina Angie Boles, LPC Executive Director 336-342-3331 aboles@co.rockingham.nc.us</p>

Governance and Leadership	Dress for Success Triangle Durham & Raleigh, North Carolina Pat Nathan Executive Director 919-286-2128 pn@dressforsuccesstrianglenc.org Rock Against Cancer Chapel Hill, North Carolina Lisa L. White, Ph.D. Executive Director 919-612-1166 lisa@rockagainstcancer.org	Wilmington Health Access for Teens Wilmington, North Carolina Tay Keong Tan, PhD Former Executive Director for Wilmington Health Access for Teens 910-452-2997 taykeong@gmail.com
Resource Development	Housing for New Hope & 10-Year Plan Durham, North Carolina Terry Allebaugh Executive Director 919-489-6282 terry@housingfornewhope.org NC Coalition Against Domestic Violence Durham, North Carolina Camilla Eubanks Development Coordinator 888-232-9124 ext. 26 ceubanks@nccadv.org Autism Community Initiative Raleigh, North Carolina James Webb Board President 919-572-0976 jamesowebb@aol.com	Dress for Success Triangle Durham & Raleigh, North Carolina Pat Nathan Executive Director 919-286-2128 pn@dressforsuccesstrianglenc.org Rock Against Cancer Chapel Hill, North Carolina Lisa L. White, Ph.D. Executive Director 919-612-1166 lisa@rockagainstcancer.org Mary's House Greensboro, North Carolina Robin Lane Board Member 336-545-1962 OKLLC@aol.com
Strategic Relationships	10-Year Plan to End Homelessness Stan Holt Durham, North Carolina Community Impact Specialist, Triangle United Way; 919-463-5023 SHolt@unitedwaytriangle.org	NAACP, 10-Year Plan to End Homelessness Durham, North Carolina Peter Anlyan, President Observability, LLC 919-682-4519 peter@observability.net

Examples of organizational capacity building projects you have completed.

Example One

The INS Group has had a long-term partnership with a local nonprofit assisting the board and staff with multiple capacity building projects. The INS Group coordinated and facilitated a series of strategic planning sessions with the board and staff and developed a comprehensive strategic plan; facilitated strategic planning sessions with the organization's alumni group and developed strategic plan; facilitated strategic fund development planning session with board and staff and wrote comprehensive strategic plan; provided ongoing grant research and grant writing; and provided a board session on succession planning and created a succession plan work plan.

Example Two

The INS Group provided executive coaching to help the executive director improve working relationships with board chair, board members and staff; facilitated meetings with the executive committee and full board regarding best practices and processes for board development; conducted board training related to roles and responsibilities; and helped create a work plan for the board.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

The INS Group provides tailored organizational development and capacity building workshops (one-day and half-day) related to grant writing, fundraising, and board development. "The Group" provides consultation regarding relationship building with city and county government and nonprofits. In addition, team building and diversity training for boards and staff are offered to nonprofits.

What other areas of expertise do you have outside of organizational capacity building?

The INS Group provides project management, community organizing services (community forums, focus groups, and facilitation of community meetings) and assistance with establishing a 501 (c) 3 organization.

Current resume and client list are included in Consultant Directory Supplemental Materials.

Intentional Vagabond, Inc. – Laura Taylor

General Information

Date: June 30, 2011

E-mail: laura@intentionalvagabond.com

Website: www.intentionalvagabond.com

Phone: 919-630-2842

Address: 482 St. Jiles Drive; Clayton, NC; 27520

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Comprehensive Organizational Assessment	Christ United Methodist Church Chapel Hill, NC Robin Holdren Executive Director 919.630.2851 robinholdren@yahoo.com	First Citizens Bank Raleigh, NC Nancy Gustafson Organization Effectiveness Director gustafson.nancy@earthlink.net 919.757.5009
Mission, Vision and Strategy	First Citizens Bank Raleigh, NC Nancy Gustafson Organization Effectiveness Director gustafson.nancy@earthlink.net 919.757.5009	North Carolina Waterworks Operators Association Emerald Isle, NC Leslie Carreiro/President/828.271.6101 lcarreiro@ashevillenc.gov Cindy Gall Administrator /252.764.2094 ncwoa@intrex.net
Governance and Leadership	First Citizens Bank Raleigh, NC Nancy Gustafson Organization Effectiveness Director gustafson.nancy@earthlink.net 919.757.5009	North State Bank Raleigh, NC Amanda Lloyd Human Resource Director 919.645.3191 alloyd@NorthStateBank.com
Internal Operations and Mangement	First Citizens Bank Raleigh, NC Nancy Gustafson Organization Effectiveness Director gustafson.nancy@earthlink.net 919.757.5009	North State Bank Raleigh, NC Amanda Lloyd Human Resource Director 919.645.3191 alloyd@NorthStateBank.com
Program Delivery and Impact	First Citizens Bank Raleigh, NC Nancy Gustafson Organization Effectiveness Director gustafson.nancy@earthlink.net 919.757.5009	Leading Solutions Group Raleigh, NC Taunya Land President, Founder 919-302-5725 tland@leadingsolutionsgroup.com
Organizational Restructuring or Mergers	First Citizens Bank Raleigh, NC Nancy Gustafson Organization Effectiveness Director gustafson.nancy@earthlink.net 919.757.5009	Leading Solutions Group Raleigh, NC Taunya Land President, Founder 919-302-5725 tland@leadingsolutionsgroup.com

Examples of organizational capacity building projects you have completed.

1. *Multi-year project included assessment and multiple initiatives that aligned, yet were implemented separately. Involved in assessment and implementation of most efforts. Conducted an organization-wide assessment to determine needs and provide solutions aimed at achieving organizational goals. As a result of the assessment, identified challenges in organizational succession within specific leadership levels, poor internal communication processes, ineffective strategy development and goal setting at operational levels, and inadequate or out-dated learning solutions for meeting organizational objectives.*

Consulted and collaborated with internal leaders, human resources, and learning professionals to develop strategy, improve processes, and establish learning efforts linked to organization performance. Designed and implemented succession planning initiative that included executive coaching. Lead area and department strategy and goal setting sessions that enabled control of results at lowest productive level. Facilitated resource optimization to provide efficient, value-add learning aimed at closing knowledge, skill, and cultural gaps while maximizing on-the-job development.

Specifics:

- *Used metrics to drive employee development initiatives. Results:*
 - *Senior talent available internally and viewed as organizational commodity.*
 - *Internal executive coaching program resulted in 90% of senior role vacancies filled from internal resources (48 month review), increased revenue and profit margins, and improved unit performance as evidenced by scorecard and manager reports.*
 - *Helped local level leaders establish vision and strategy that aligned with organizational strategy. Results:*
 - *Aligned and identified individual role impact with overall organization results.*
 - *Acquired input from and created support by local level employees.*
 - *Created central organizational support of efforts that accommodated local differences.*
 - *Increased productivity and morale as evidenced by increases in goal achievement and manager reports.*
 - *Consulted with segment managers and learning professionals to design and implement learning strategies that addressed specific organization needs. Results:*
 - *Improved time to market of learning deliverables by 17% over 7 months.*
 - *Moved from training culture to multi-pronged learning approach linking initiatives to each other, to performance measures, and to business objectives.*
 - *Improved strategic perspective and increased organizational readiness reported by management.*
2. *Six month project included assessment of North American region of global organization and recommendation of organization design changes to effect efficiencies and effectiveness. Not involved with implementation, which is ongoing; results of re-structuring not currently available.*

Conducted assessment of global organization to determine alignment, efficiency, and effectiveness of internal and external communication and marketing efforts across units that operated as independent organizations under a single global entity. As a result of the assessment, disparate efficiencies and levels of effectiveness were identified. Each unit used centralized resources differently, some not at all; each unit had its own internal and external processes; and each unit communicated the same message differently. Economies of scale were not leveraged, some units were not well supported, and most North American unit leaders believed that the larger organization did not do a good job of marketing in North America. Most unit leaders and employees believed that independent units and centralized marketing and communications functions could do a better job of identifying linkages between units and leveraging them to create more effective and efficient marketing strategies.

Consulted with Vice President of North American Communications and unit leaders to identify business and unit-specific challenges. Crafted a change to the organizational structure and to key processes to align marketing and communication functions around products and services; specially, low-volume/high price and high volume/low price to create economies of scale, resource optimization, talent availability, and alignment of like-functions.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

- *Certified executive coach with a focus on sustainability of leadership capacity for individual leaders (avoid burn out, maintain enthusiasm and energy, and remain healthy) and organizations (perpetual development linked to future goals of organization).*
- *Change management: help organizations and individuals implement and adjust to changes introduced by capacity building initiatives.*

What other areas of expertise do you have outside of organizational capacity building?

- *Instructional designer: use skill to keep cost down and to incorporate organization work into learning initiatives, resulting in less time away from functional work and alignment of knowledge and skill to work.*

Current resume is included in Consultant Directory Supplemental Materials.

Maggie Clay Love Consulting – Maggie Clay Love

General Information

Date: July 21, 2010

E-mail: maggie@maggielove.com

Website: _____

Phone: 919-845-2770

Address: 7705 Harps Mill Road; Raleigh, NC; 27615

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Mission, Vision, and Strategy	<p>Haven House Services Raleigh, NC Michelle Zechmann Executive Director Phone (work): 919.833.3312 Email: mzechmann@havenhouse.org</p> <p>Alliance of Disability Advocates, CIL Raleigh, NC Betsy Jones Ludwig President, Board of Directors Phone (cell): 919.271.3001 Email: betsy@artsaccessinc.org</p>
Governance and Leadership	<p>Haven House Services Raleigh, NC Katy FitzGerald Chairman, Board of Directors Phone (cell): 919.225.9770 Email: Fitzgerald.katy@gmail.com</p> <p>American Heart Association Morrisville, NC Chanda Douglas-Ward Senior VP, Human Resources Phone (work): 919.463.8330 Email: chanda.douglas-ward@heart.org</p>
Resource Development	<p>Capital Bank Raleigh, NC Grant Yarber President and CEO Phone (work): 919.645.3494 Email: gyarber@capitalbank-nc.com</p> <p>North Carolina Symphony Raleigh, NC Rob Maddrey Director of Statewide Development Phone (work): 919.833.2750 Email: rmaddrey@ncsymphony.org</p>

Strategic Relationships	Fidelity Investments Durham, NC Kyle Rose Senior VP, Regional Management CEO Phone (work): 919.458.4000 Email: kyle.rose@fmr.com Capital Bank Raleigh, NC Grant Yarber President and CEO Phone (work): 919.645.3494 Email: gyarber@capitalbank-nc.com
Program Delivery and Impact	Voices Together Chapel Hill, NC Yasmine White Founder and Executive Director Phone (work): 919.942.2714 Email: yasmine@voicestogether.net) Alliance of Disability Advocates, CIL Raleigh, NC Rene Cummins Executive Director Phone (work): 919.833.1117 Email: rene.cummins@alliancecil.org

Examples of organizational capacity building projects you have completed.

For this statewide nonprofit, our challenge was to create an event within the fiscal year that would replace \$100,000+ net dollars in lost revenue, focusing on a different area in the state as part of their mission of statewide service. We developed a strategy and plan that leveraged existing relationships in the Triangle to identify, cultivate and solicit sponsorships and donors, and to build new philanthropic partnerships with companies as well as a new individual donor base in an untapped geographic area. As new sponsors and supporters were brought on board, they added to the list of prospective companies and donors. The event exceeded its goals in both dollars and relationships. The strategy was replicated in previous years to continue to expand the donor base and statewide service, but as part of their overall development strategy rather than as a contingency plan.

This local nonprofit completed an internal SWOT analysis and goal-setting with the Board of Directors and staff management team independently, and was poised to build a more active Board that would lead to increased public support, and redefine its volunteer-staff partnership so the management team and Board were more fully engaged. Just as the building process was to begin, the Executive Director was recruited for another position and left the organization. Our goal was to execute a thorough national search for the best executive possible without losing the focus and momentum of building Board capacity and establishing a strong volunteer-staff partnership. Our strategy was to postpone the actual Board cultivation and recruitment during the executive search timeline, but weave the overall Board development goals into the search process so they were part of the recruitment process and criteria. As we closed in on the final candidates, we purposefully included the staff management team to activate engagement between Board volunteers and staff, and build community for future development. The inclusive process resulted in little momentum towards capacity building lost as well as the hiring of a dynamic executive that recognized the work done and was ready to build on the foundation already established.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

I also have a number of short workshops for volunteers and/or staff (generally 2 hours), such as Understanding Fundraising (the language of development), Leadership and Staffing (clarifying roles and volunteer-staff partnerships), Basic Planning for the Complete Annual Campaign, Prospecting Donors, Integrating Fundraising with Marketing and Mission, and Major Gifts and Corporate Sponsorships: Making the Face-to-Face Ask. All workshops are tailored to the needs and goals of the organization.

What other areas of expertise do you have outside of organizational capacity building?

Grantwriting and research

Current resume and client list are included in Consultant Directory Supplemental Materials.

Martin Law Firm – Marty Martin

General Information

Date: July 16, 2010

E-mail: Marty_Martin@martinlegalhelp.com

Website: www.martinlegalhelp.com

Phone: (919) 272-2106

Address: PO Box 19636; Raleigh, NC; 27619

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant was not invited to participate in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work given they did not designate expertise in a particular area of specialty.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Examples of organizational capacity building projects you have completed.

My law practice encompasses work across all of the issues listed above. References are only provided upon specific request.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Information not provided.

What other areas of expertise do you have outside of organizational capacity building?

Information not provided.

Current bio is included in Consultant Directory Supplemental Materials.

McGlynn Associates, Inc. – Maggie McGlynn

General Information

Date: July 22, 2010

E-mail: Maggie@maggiemcglynn.com

Website: _____

Phone: 919-968-7953

Address: 24 Mount Bolus Road; Chapel Hill, NC; 27514

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Mission, Vision, and Strategy	Liz Maguire - Ipas President and CEO 300 Market Street Suite 200 Chapel Hill, NC 27516 (919) 960-5590 maguirel@ipas.org Debra King – CASA Executive Director 624 West Jones Street Raleigh, NC 27603 (919) 754-9965 dking@casanc.com
Governance and Leadership	See Mission, Vision, and Strategy
Organizational Restructuring or Mergers	Deborah Nelson Division of Public Health Women's and Children's Health Section, 1928 Mail Service Center, Raleigh, North Carolina 27699-1928 919-707-5677 Deborah.Nelson@ncmail.net Alisa Nagler Assistant Professor of Medical Education, Office of Graduate Medical Education Duke University Hospital Davison Building, Yellow Zone, Room 1086 Box 3951 Durham, NC 27710 919-681-6601 alisa.nagler@duke.edu

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

A hallmark of our work has been in the area of executive team coaching and service system design. Over the past several years we have provided facilitation, coaching and consultation to a number of initiatives including the consolidation of the Wake County Area Mental Health Program, Department of Social Services and Public Health (1995-99); the creation of the Capital Area JobLink Career Center (1996-1997); the development of a comprehensive and coordinated system of primary care and supportive services for the Wake County HIV/AIDS Care Coalition (1997-98); the design and facilitation at the WCHS Wide-A-Wake Community Forums (1998

and 1999); the preparation of a Comprehensive Plan for Services to Address Alcohol, Tobacco and Other Drugs in Wake County (1999), and, retreat sessions for the North Carolina Council on Workforce Preparedness (1999-2004).

Current efforts include facilitation of collaboration within larger systems, such as a strategic visioning process with Ipas, an international women's health organization (2004-current), a health sector workforce development initiative for systemic change in recruitment, retention and progression of healthcare occupations called the Health Care Works! Coalition (2001-2008), an Early Childhood Comprehensive Systems initiative in the State of North Carolina (2004-present), a Ready Schools initiative to prepare young children to succeed (2005-2008), global planning efforts with Planned Parenthood Federation of America International (2005-2006), a multi-organizational approach to designing and developing shared information technology among international health organizations called NPOKI (Non-Profit Organizational Knowledge Initiative - 2005), a statewide coalition building for the Indiana Primary Healthcare Association for legislative lobbying and other advocacy on issues affecting persons with HIV/AIDS and their caregivers (2001-03), and strategic planning with Family Health International, a global healthcare institution (2001-03).

An example is our work with the Triangle AIDS Collaborative, involving six organizations with similar missions seeking ways to coordinate services for clients and address duplication in administrative activities. After organizing and working together effectively as a collaborative for three years, the group decided to take the next step, and after a year of design work and a one and a half-year implementation plan, a network consolidation was created called the Alliance of AIDS Services • Carolina. Using a model of multiple corporations, the new organizational design created a single administrative and operations hub to accommodate currently three and potentially more organizations as the network grows over time (1994-1999). Our company also facilitated the mergers of TRAIN and DIAM, providers of inter-faith care giving services to persons with HIV/AIDS (1996), and Specialized Services for Children, Inc. with Employment Opportunities, Inc. to form Community Partnerships, Inc. for persons with disabilities (1993-95). We continued to serve CPI since the merger in its strategic planning, board development, redesign of its staffing structure and other management and organizational development (1995-2002).

What other areas of expertise do you have outside of organizational capacity building?

- Equine Guided Education for Leadership Development
- Womens' Leadership and Personal Transformation Retreats and Workshops

Current resume and client list are included in Consultant Directory Supplemental Materials.

moss + ross LLC – Mary Moss and Susan Ross

General Information

Date: August 5, 2010 E-mail: mross@mossandross.com
sross@mossandross.com
 Website: http://mossandross.com Phone: 919-801-6502 (Mary) 919-819-7232 (Susan)
 Address: 1536 Carr Street; Raleigh, NC; 27608

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mission, Vision, and Strategy	The Hill Center www.hillcenter.org Allison Haltom Vice Chair of the Board, Chair of Strategic Planning a.haltom@duke.edu 919-489-2834 IntraHealth International LLC www.intrahealth.org Laura Hoemeke Director, Strategic Communications lhoemeke@intrahealth.org 919-313-9100							
Resource Development	IntraHealth International LLC www.intrahealth.org Rebecca Kohler Vice President for Strategic Development and Communications rkohler@intrahealth.org 919-313-9100 Ronald McDonald House of Durham www.ronaldhousedurham.org Bill Donovan Executive Director bdonovan@ronaldhousedurham.org 919-286-9305 Caring House www.caringhouse.org Sheridan Townsend Executive Director Sheridan_Townsend@caringhouse.org 919-490-5449							
Strategic Relationships	North Carolina Museum of History Associates www.ncmuseumofhistory.org Jennie Hayman Former Chair of the Board of History Associates jen2will@bellsouth.net 919-606-8630 Triangle Family Services www.tfsnc.org Clymer Cease Chair of the Board of Directors 919-836-9751 clymerc@pbclarchitecture.com							

Internal Operations and Management	<p>YMCA of the Triangle www.ymcatriangle.org Bruce Ham Senior Vice President of Strategic Financial Development 919-719-9622 Bruce.ham@YMCAtriangle.org</p> <p>Habitat for Humanity of Durham www.durhamhabitat.org Miguel Rubiera Executive Director 919-682-0516 mrubiera@durhamhabitat.org</p>
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Examples of organizational capacity building projects you have completed.

1. We partnered with an organization that had never created an annual fund. We worked with them to segment their data base, design the materials, write the letters, and assess the results. To date, in its first six months, the Annual Fund has added \$108,000 to the bottom line.

2. We worked with an organization that had no natural constituency and helped them create a list of prospects. These calls were designed to be gifts of over \$1,000 at least with a strong preference for gifts over \$5,000. The staff person in charge began making systematic phone calls and visits to a well-defined list of names. We trained not just that one staff person but several other executives as well as the board chair on how to make a major gifts call. To date, the organization received one \$100,000 pledge and close to \$80,000 in other gifts.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

We have extensive hands-on campaign experience and have been engaged in several feasibility studies. We consider campaign readiness one of our specialty areas as well as creating annual giving programs and major gifts strategies

What other areas of expertise do you have outside of organizational capacity building?

We have recently completed a 9-month strategic planning initiative with a local nonprofit and are well-versed in strategic planning. Additionally, we can provide on-site staff support in nearly every area of development. We have worked with one nonprofit on a board development project and have received constant positive feedback on our work. Finally, we have been hired to facilitate a number of retreats on fundraising, the effective use of boards and volunteers, and strategic planning.

Current bios and client list are included in Consultant Directory Supplemental Materials.

Mulberry Tree Consulting – Betsy Polk Joseph & Maggie Chotas

General Information

Date: July 16, 2010 E-mail: bp@mulberrytreeconsulting.com
mec@mulberrytreeconsulting.com
 Website: http://www.mulberrytreeconsulting.com/ Phone: 919-593-3958 or 919-801-4748
 Address: 509 Lonebrook Drive; Chapel Hill, NC; 27516

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

Check Areas of Specialty:	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Comprehensive Organizational Assessment	<p>UNC School of Government, Spring 2007-Summer 2009; Summer 2010 Mike Smith Dean 919-966-4107 msmith@sog.unc.edu</p> <p>Threshold Clubhouse, Durham, NC Fall 2007-Summer 2008 Susie Deter Director 919-682-4124 s.deter@thresholdclubhouse.org</p>
Mission, Vision, and Strategy	<p>Mariposa School, Spring 2010 Laura Fish Board Chair 919-681-3820 Fish0006@mc.duke.edu</p> <p>Chapel Hill Public Schools Foundation, Fall 2007-Spring 2008 Kim Hoke Director 919-968-8819 khope@chccs.k12.nc.us</p>
Governance and Leadership	<p>SJF Advisory Services, Fall 2006, Fall 2007 and Winter 2010 Anne Claire Broughton Senior Director 919-530-1177, ext. 403 broughton@sjfund.com</p> <p>Environmental Educators of North Carolina, Spring 2006 Laura Webb Smith former Director 919-560-1200 Laura.webb.smith@gmail.com</p>
Internal Operations and Management	<p>Town of Carrboro, October 2006 Steve Stewart Town Manager 919-918-7314 sstewart@townofcarrboro.org</p> <p>Duke School, 2004-2005 Bob Robinson Former Middle School Director 919-493-2642 Bob.robinson@dukeschool.org</p>

Program Delivery and Impact	Clean Energy Durham, Spring 2010 Judy Kincaid Executive Director 919-724-1219 judy@cleanenergydurham.org
	Institute for Emerging Issues, Spring 2010 Anita Brown-Graham Director 919-515-7741 arbrowng@ncsu.edu

Examples of organizational capacity building projects you have completed.

Example 1: *MTC facilitated a multi-year process that involved all 145 employees from all parts of an organization. Through close work with a cross-representational project leadership team, we guided a process that included facilitated focus groups that assessed the current culture and gathered feedback on future directions. We also designed and facilitated a capstone strategic planning event attended by over 100 employees at all levels of the organization. As a result of this process, the organization identified strategic priorities for the coming years, including: more conscientious inclusion of all employees in organizational initiatives; greater collaboration across levels; clearer communication on micro and macro levels; increased organization-wide familiarity and an ongoing focus on confronting the tension between being a responsive culture with high expectations and the limits of internal capacity.*

As a result of our work with this organization, mechanisms for furthering each of these goals were put in place, including a cross-representational standing advisory committee to the leader and specific cross-representational committees charged with carrying out these initiatives. As part of the implementation of the strategic plan, for example, we worked with a committee to design and facilitate another organization-wide retreat to develop communication and collaboration skills, as well as address the issue of responsiveness versus capacity.

A key result of MTC's work with this organization has been an increase in the transparency of decision –making by leadership. During recent budget cuts, for example, the leader held roundtable discussion groups open to all employees to provide information in a timely and open way. Before our work with this organization, that level of information would have only been shared with a small segment of employees. Doing so with everyone significantly reduced anxiety and boosted cohesion, including the sense that everyone in the organization was pulling together to face challenging times. Another key result of MTC's work with this organization is a culture that's transitioned from being reactive with employees' awareness limited to their specific departments and customers' needs to one that is proactive – where employees at all levels are aware of organizational and external demands and are empowered and prepared to meet these needs in creative, collaborative, entrepreneurial ways.

Example 2: *MTC designed and guided the "Better Together Project" for a local municipality. During this multi-year culture improvement project, MTC worked closely with a cross-departmental project leadership team to develop and define steps for carrying out an organizational vision. Strategy groups throughout the organization were empowered to develop and implement goals. Key components of this project involved the design and convening of organization-wide focus groups, management team development (in alignment with project leadership coaching and development), vision and strategic planning and the facilitation of annual organization-wide retreats, hosted by the project leadership team. Annual retreats include a large percentage of the organization in attendance.*

Five years later, the Better Together Project is alive and well in this organization – project leadership team members are considered organizational leaders and strategy groups are tasked with keeping employees connected and engaged with the vision. Ongoing results include a collaborative, cohesive work environment that supports employees at all levels and actively promotes a productive work environment, via cross-departmental collaboration and resource sharing.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Leadership development, strategic planning, team building, large and small group facilitation

What other areas of expertise do you have outside of organizational capacity building?

Instructional design, MBTI training, individual and small group coaching, whole system culture change

Current bios and client list are included in Consultant Directory Supplemental Materials.

New Perspectives Consulting Group, Inc. – Kristin Bradley-Bull & Tobi Lippin

General Information

Date: July 21, 2010

E-mail: kristin@newperspectivesinc.org,
tobi@newperspectivesinc.org

Website: http://www.newperspectivesinc.org/

Phone: 919-286-5995

Address: 1429 Broad Street; Durham, NC; 27705

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Mission, Vision, and Strategy	<ul style="list-style-type: none"> 1) Prevent Child Abuse NC Raleigh, NC Michelle Hughes Executive Vice President (919) 256-6605 mhughes@preventchildabusenc.org 2) Health, Safety and Environment Dept. /United Steelworkers Pittsburgh, PA Jim Frederick Assistant Director 412-562-2586 jfrederick@usw.org
Governance and Leadership	<ul style="list-style-type: none"> 1) NC Gives Raleigh, NC Donna Chavis Executive Director (919) 256-6908 donna.chavis@ncgives.org 2) Blueprint NC Raleigh, NC Julie Mooney former Executive Director (919) 861-0609 Julie@ncjustice.org
Program Delivery and Impact	<ul style="list-style-type: none"> 1) Children's Law Center Washington, DC Gary Gold COO (202) 467.4900 x506 ggold@ChildrensLawCenter.org 2) Z. Smith Reynolds Foundation - Women's Economic Equity Project Winston-Salem, NC Mary Fant Donnan Program Officer (800) 443-8319 x 101 Maryd@zsr.org

Examples of organizational capacity building projects you have completed.

- 1) *New Perspectives worked with an organization to shift one of its programs to be more outcomes-focused. This entailed: helping the organization gather and synthesize the data it already collected about its program; collecting additional data through interviews, surveys, etc. of key internal and external stakeholders; analyzing this data and sharing it back with the organization; facilitating a process of developing outcomes and then examining how current activities and resources are and are not well-aligned to meet these outcomes; re-designing the programs as needed to better meet outcomes; and developing an overall evaluation plan, indicators, data collection instruments, and a data collection plan to evaluate both program implementation and progress toward outcomes. All of the above steps included skill-building for staff to continue this process of ongoing program review and program strengthening on its own. Due to the success of this program review, New Perspectives is now completing this process for another program in the same organization.*
- 2) *New Perspectives provided support for a coalition of organizations working on public policy change. This involved applying an anti-oppression lens to the coalition's work. To this end, New Perspectives conducted data collection and analysis; facilitated meetings; conducted training; and completed review and analysis of policies, protocols, and committee structure. Building the capacity of staff and others to complete this work in the future was built into the project.*

Other Areas of Expertise**List any other areas of expertise relevant to organizational capacity building.**

- *Coaching organizations to implement new initiatives*
- *Coaching, training, and technical assistance in using data*
- *Coaching on facilitating participatory (or more participatory) processes*
- *Train-the-trainer development and implementation*
- *Training and coaching on designing and implementing assessments and evaluations*
- *Establishing internal organizational systems (non-financial)*

What other areas of expertise do you have outside of organizational capacity building?

- *Development of training curricula and materials*
- *Educational materials development*

Current resumes and client list are included in Consultant Directory Supplemental Materials.

The NonProfit Collaborative – Michelle Spears

General Information

Date: July 27, 2010

E-mail: michelle@nonprofitcollaborative.org

Website: http:// www.nonprofitcollaborative.org

Phone: 336-998-3009

Address: PO Box 2098; Advance, NC; 27006

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comprehensive Organizational Assessment	Heartstrings Infancy Loss & Pregnancy Support, Greensboro, NC, Sue Young, Board Chairman, 336-508-7997 syoung@brookspierce.com Chordoma Foundation, Greensboro, NC, Laura Gemme, Executive Coordinator, 336-306-6888, lauragemme@gmail.com
Mission, Vision, and Strategy	Ekissa, Advance, NC, Sarah Ledford, President, 336-971-4855, sarah@akissa.com Imprints, Winston-Salem, NC, Nikki Byers, Executive Director, 336-722-6296, info@imprintforfamilies.org
Governance and Leadership	Davie County Arts Council, Mocksville, NC, Regan Brown, Executive Director, reganjbrown@gmail.com Smart Start of Forsyth County, Winston-Salem, NC, Joel Leander, Chairman of the Board, 336-725-5438, ssfc@smartstart-fc.org
Resource Development	The Tomorrow Fund at the Triangle Community Foundation, Raleigh, NC, Diane Lanevi, Founder, 919-293-1919 diane.lanevi@gmail.com Africa Renewal Ministries, Peter Kasirivu, President, 210-979-7441, peterk@africarenewal.org
Internal Operations and Management	Heartstrings Infancy Loss & Pregnancy Support, Greensboro, NC, Mary Easton, Executive Director, 336-335-9931, Marye@hearstringsupport.org (rehired after comprehensive organizational assessment to place director of development and re-open Winston-Salem office.) Boys Camp, Winston-Salem, NC, Myra Aaargard Espersen, Board Member, 336-748-1223, tarheelbread@bellsouth.net

Examples of organizational capacity building projects you have completed.

In both situations the organizations had reached their five year anniversary since inception and had the same original founding executive directors in place, and that is where the similarities end.

One organization's founder was ready to retire and turn the reigns over to the next generation of leadership while the other was holding on so tightly that all growth and movement in the organization at every operational level was having the life choked out of it.

In both situations a complete organizational capacity building assessment involving all key stakeholders led to dramatic change, and realizations, in both organizations regarding their respective need to change and modify current programs, practices.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

What other areas of expertise do you have outside of organizational capacity building?

The NonProfit Collaborative, because we are a cooperative of consultants, has a CPA, the Wake Forest University Community Law Clinic, and a nationally recognized nonprofit software expert, as part of our firm. Accounting, legal and technology issues can often present obstacles to organizations who are merging, expanding, changing names, etc., and these three areas of expertise are what we refer to as "second layer" needs of most nonprofits.

One Plus One, Inc. – Sara Jarvis

General Information

Date: August 10, 2010

E-mail: Sarajarvis56@gmail.com

Website: _____

Phone: 919-423-1174

Address: 1019 W. Markham Avenue; Durham, NC; 27701

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Mission, Vision, and Strategy	Teresa Turner (919-618-3696) Stacy Gromatski (850-544-6324)
Governance and Leadership	Stacy Gromatski (850-544-6324) Donna Weaver (336-219-2700)
Internal Operations and Management	Teresa Turner (919-334-1172) Joan Pennell (919-513-3464)
Program Delivery and Impact	Stan Holt, United Way (919-941-5140)

Examples of organizational capacity building projects you have completed.

- *Team building with organizational leadership teams*
- *Integration of best practice approaches across 200+ member agency*

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

- *facilitation*
- *program planning*

What other areas of expertise do you have outside of organizational capacity building?

- *staff training*
- *curriculum development*
- *training of trainers*
- *online education and training*

Current resume is included in Consultant Directory Supplemental Materials.

Perkinson Law Firm, P.A. – Ashley Matlock Perkinson

General Information

Date August 2, 2010

E-mail: ashleyperkinson@me.com

Website: www.perkinsonlawfirm.com

Phone: 919-210-8209

Address: 2518 Kenmore Drive; Raleigh, NC; 27608

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Comprehensive Organizational Assessment	<p>North Carolina PTA Raleigh, NC Debra Horton Executive Director (919) 787-0534 djh@ncpta.org</p> <p>Licensed Professional Counselors Association of NC Suzanne Walker Past President (910) 222-6219 walkercssj@aol.com</p>
Mission, Vision, and Strategy	<p>North Carolina PTA Raleigh, NC Debra Horton Executive Director (919) 787-0534 djh@ncpta.org</p> <p>Licensed Professional Counselors Association of NC Suzanne Walker Past President (910) 222-6219 walkercssj@aol.com</p>
Governance and Leadership	<p>North Carolina PTA Raleigh, NC Debra Horton Executive Director (919) 787-0534 djh@ncpta.org</p> <p>Licensed Professional Counselors Association of NC Suzanne Walker Past President (910) 222-6219 walkercssj@aol.com</p>

Resource Development	<p>North Carolina PTA Raleigh, NC Debra Horton Executive Director (919) 787-0534 djh@ncpta.org</p> <p>Licensed Professional Counselors Association of NC Suzanne Walker Past President (910) 222-6219 walkercssj@aol.com</p>
Strategic Relationships	<p>North Carolina PTA Raleigh, NC Debra Horton Executive Director (919) 787-0534 djh@ncpta.org</p> <p>Licensed Professional Counselors Association of NC Suzanne Walker Past President (910) 222-6219 walkercssj@aol.com</p>
Internal Operations and Management	<p>North Carolina PTA Raleigh, NC Debra Horton Executive Director (919) 787-0534 djh@ncpta.org</p> <p>Licensed Professional Counselors Association of NC Suzanne Walker Past President (910) 222-6219 walkercssj@aol.com</p>
Program Delivery and Impact	<p>North Carolina PTA Raleigh, NC Debra Horton Executive Director (919) 787-0534 djh@ncpta.org</p> <p>Licensed Professional Counselors Association of NC Suzanne Walker Past President (910) 222-6219 walkercssj@aol.com</p>
Organizational Restructuring or Mergers	I am currently working with a client on restructuring; however, this is a confidential client arrangement.

Examples of organizational capacity building projects you have completed.

Assisted an organization in developing strategic partnerships with leading policymakers. Assisted an organization in securing legislative funding for the first time in its history. Assisted organizations in revising bylaws and governing documents to allow for greater effectiveness. Successfully lobbied for amendments to organizations licensure laws. Helped secure both state and private funding for program initiatives. Consulted with client on merger/restructuring matters.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Government Relations and Lobbying

What other areas of expertise do you have outside of organizational capacity building?

Legal consultation on compliance issues, governing documents and other legal matters.

Current bio and client list are included in Consultant Directory Supplemental Materials.

Pivot Point Media – Guilford Fitts

General Information

Date: July 5, 2011 E-mail: gil@pivotpoint-media.com
 Website: www.pivotpoint-media.com Phone: 919-251-9570
 Address: 1107 Wells Street; Durham, NC; 27707

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Program Delivery and Impact	Autism Society of NC Center for Responsible Lending							

Examples of organizational capacity building projects you have completed.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

What other areas of expertise do you have outside of organizational capacity building?

Pivot Point Media has specialized in developing marketing tools for non profits especially in health areas. These include projects designed for awareness and behavior modification.

They have been detailed:

- 1) Clarifying the Value Proposition for Services Rendered
- 2) Developing Campaign Strategy and Messaging
- 3) Deciding what media to use
- 4) Creating marketing tools – Everything from logo design, websites, posters, radio and television production, broadcast commercials, magazine ads and small documentaries.

Public Intersection Project – Lydian Altman & Margaret Henderson

General Information

Date: July 10, 2010

E-mail: lydian@sog.unc.edu, Margaret@sog.unc.edu

Website: http://www.publicintersection.unc.edu

Phone: 919-962-0103

Address: UNC School of Government; CB#3330, Knapp-Sanders Building; Chapel Hill, NC; 27599

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Mission, Vision, and Strategy	<p>Kelley O'Brien, Board Chair 919/962-8273 Obrien@sog.unc.edu</p> <p>Emily Bruce, Development Director, 919/831-6941 ebruce@nctheatre.com</p> <p>Curtis Ricketts, Office of Organizational Effectiveness NC Employment Security Commission 919-715-0013 x 383 curtis.ricketts@ncesc.gov</p>
Governance and Leadership	<p>Betty Taylor, CEO btaylor@cphs.org 336-714-9100</p> <p>Pam Fulk, Director pamfulk@cptigers.org 919/542-4684</p> <p>Monika Johnston-Hostler monica@nccasa.org 919/ 870-8881</p>
Strategic Relationships	<p>Cindy E. Edwards, MSW, Director sfvc@nc.rr.com 910-739-8622 (Admin & Crisis Line)</p> <p>Cindy Oakes Cindy.oakes@carolinahealthcare.org 704/403-1516</p>
Internal Operations and Management	<p>These issues often emerge during discussion on other issues even though our clients have not specifically requested work in this area.</p>
Organizational Restructuring or Mergers	<p>We have not consulted with nonprofits about formal organizational mergers, but we frequently have facilitated meetings in which groups of community stakeholders came together to decide how they might work together to accomplish shared goals. These conversations might not be as logistically complicated as mergers but do involve similar processes of clarifying objectives, identifying resources and challenges, gaining agreement and commitment, etc.</p>

Examples of organizational capacity building projects you have completed.
Information not provided.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

- *Developing cross sector relationships to sustain community programs (government, nonprofit, philanthropy, business, & faith-based organizations)*
- *Overall organizational capacity assessment, which includes all of the expert areas listed here*
- *Exploring specific funder relationships, especially between nonprofit and local governments*

What other areas of expertise do you have outside of organizational capacity building?

- *Much of our work has involved both staff and elected officials of city and county governments. This insider experience can be useful for nonprofits trying to learn how best to position themselves as partners with local governments.*
- *Margaret Henderson has taught a graduate course on Nonprofit Management at UNC-Chapel Hill for ten years.*
- *Lydian and Margaret often work as a consulting team and draw upon their parallel and complementary work and life experiences, varied personality preferences and interests, and educational backgrounds to provide clients with the benefit of a well-rounded perspective.*

Public Intersection project description and current resumes are included in Consultant Directory Supplemental Materials.

Satinsky Consulting, LLC – Margie Satinsky

General Information

Date: July 15, 2010

E-mail: margie@satinskyconsulting.com

Website: www.satinskyconsulting.com

Phone: 919-383-5998

Address: 201 Cedar Ridge Way; Durham, NC; 27705

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant was not invited to participate in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work given they did not designate a particular area of specialty.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Examples of organizational capacity building projects you have completed.

Comprehensive organizational assessment; mission, vision, strategy; governance and leadership; internal operations and management; and organizational restructuring or mergers. Specific references not provided.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Information not provided.

What other areas of expertise do you have outside of organizational capacity building?

Medical Practice Management Services

- *Practice Start-up and Expansion of Services and/or Locations*
- *Information Technology Planning and Implementation*
- *Managed Care Activities*
- *Revenue Cycle Management*
- *Strategic Planning*
- *Operational Analysis and Improvement*
- *Marketing*
- *Development of Website Content*
- *HIPAA Privacy and Security Rule Compliance and Training*
- *Human Resource Management*
- *Network of Expert Consulting Resources*
- *Speaking and Teaching on Medical Practice Management*

Additional information is included in Consultant Directory Supplemental Materials.

Sky2x – David Spratte

General Information

Date: September 28, 2009 E-mail: spratte@sky2x.com
 Website: http://sky2x.com/ Phone: 919-342-5932
 Address: P.O. Box 41532; Raleigh, NC; 27629

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant was not invited to participate in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work given their expertise is limited to two particular areas of specialty.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strategic Relationships	Tia McLaurin tmclaurin@wakebgc.org Jesse Rutledge jrutledge@ncsc.org Sue Hall suehall@dukeupress.edu
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Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

In addition to graphic and web design, we also handle a great deal of brand development. Any organization can benefit from a professionally developed brand.

What other areas of expertise do you have outside of organizational capacity building?

Sky2x Creative offers writing, editing, photography, graphic design and brand development to small and medium size organizations. We help clients tell their stories.

Starsonneck Consulting – Leslie Starsonneck

General Information

Date: August 10, 2010

E-mail: lstarsonneck@nc.rr.com

Website: N/a

Phone: 919-624-3487

Address: 9547 Brookchase Drive; Raleigh, NC; 27617

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant has not participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Resource Development	Jessie Ball DuPont Fund Jacksonville, Fla Barbara Roole Senior Policy Director (800) 252-3452 broole@dupontfund.org NC Community Foundation Raleigh, NC Jennifer Tolle Whiteside Executive Director jennifertollwhiteside@nccommunity.org
Strategic Relationships	Center for Child and Family Health Durham, NC Robert Murphy Executive Director (919) 419-3474 Robert.Murphy@duke.edu InterAct Raleigh, NC Kathy Johnson Associate Director (919) 828-7501 kathyj@interactofwake.org
Program Delivery and Impact	Z. Smith Reynolds Foundation Winston-Salem, NC James Gore Program Officer 800 443-8319 Jamesg@zsr.org Roanoke Chowan Task Force Judicial District 6B Jackson, NC Judge Alfred Kwasipui Chair 252.534.1785 Alfred.W.Kwasipui@nccourts.org

Organizational Restructuring or Mergers	NC Administrative Office of the Courts Raleigh, NC McKinley Wooten Deputy Director (919) 890-1000 MckInley.Wooten@nccourts.org
	InterAct Raleigh, NC Kathy Johnson Associate Director (919) 828-7501 kathyj@interactofwake.org

Examples of organizational capacity building projects you have completed.

Designed and oversaw a project for the Z. Smith Reynolds Foundation to increase the long term financial sustainability of non-profits by evaluating their financial positions and organizational capacity, and assigning a fundraising professional to assist in resource diversification especially related to individual giving, and, board leadership and engagement in fundraising. The first phase of the project involved 6 non-profit agencies of various sizes and stages of development, two of which were based in the Triangle. Based on positive and sustained results, the project continued and expended to work with 9 additional non profit agencies.

Worked to build the capacity of 6 North Carolina domestic violence programs to identify and respond to the needs of children exposed to domestic violence by adopting standard screening measures, using behavior management techniques, and establishing partnerships with child-serving community agencies.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Related to system-building capacity, have developed best practices and standard protocol for NC District Court Judges and for magistrates.

Developed minimum program standards for 120 non-profits receiving state funding to provide domestic violence and sexual assault services.

What other areas of expertise do you have outside of organizational capacity building?

Content Areas: domestic violence, sexual assault, child abuse, criminal justice, juvenile justice, mental health

Skill Areas: public policy including legislative and administrative advocacy and policy; government relations; grantmaking.

Current resume and client list are included in Consultant Directory Supplemental Materials.

Summers Consulting Services – Brenda Summers

General Information

Date: July 16, 2010

E-mail: bsummers@summersconsultingservices.com

Website: http://summersconsultingservices.com/

Phone: 919-847-3184

Address: 6561 Hearthstone Dr.; Raleigh, NC; 27615

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Mission, Vision, and Strategy	<p>NC Conservation Network Raleigh, NC Brian Buzby, Executive Director 919-857-4699 brian@ncconservationnetwork.org</p> <p>Justice Policy Center Durham, NC Charmaine Fuller, former Executive Director now in state govt 919-807-4270 charmaine.fuller.cooper@gmail.com</p> <p>Family Support Network of NC Chapel Hill, NC Tamara H. Norris, Information & Referral Coord Family 919-966-0328 Tamara_Norris@unc.edu</p>
Governance and Leadership	<p>Durham's Partnership for Children Durham, NC Marsha Basloe, Executive Director 919-403-6960 marsha@dpfc.net</p> <p>NC Justice Center Raleigh, NC Debra Tyler Horton, former Deputy Director now at AARP dthorton@aarp.org 919-966-0328</p> <p>NC Council on Developmental Disabilities Raleigh, NC Holly Riddle, Director of Council Holly.Riddle@ncmail.net 919-420-7901</p>
Internal Operations and Management	<p>Wake Teen Raleigh, NC Joyce Wood, Executive Director 919-828-0035 jwood@waketeen.org</p> <p>NCABR Raleigh NC Suzanne Wood Wilkison 919-785-1304 swilkison@ncabr.org</p>

Examples of organizational capacity building projects you have completed.

I have worked with one organization in 2003 to develop its first strategic plan and then again in 2007 to revise and update the plan. The first plan involved extensive surveys and interviews along with board and staff retreats. The great thing was the nonprofit implemented the plan and then was ready to update it and refine activities four years later.

I worked with a virtual organization with individuals in several locations to develop a strategic plan, doing interviews with staff and clients and working through issues at a weekend planning session. Six months later I worked with the staff to determine how they could work together more effectively to carry out the plan, focusing on where there were difficulties and where they could build on the strengths of the company.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

I have taught courses about nonprofits including fundraising at NC State. Have worked with nonprofits on coalition building and collaboration. Have done some coaching with executive directors and worked with staffs on teambuilding sessions. Have certification in Myers Briggs Type Indicator® and have used that in teambuilding exercises with nonprofits and other groups. Have worked as a consultant for ten years and have experience as an executive director for three organizations. Work with one association on a regular basis on project management for group forums and communication activities. Have worked in public relations and communications in previous positions.

What other areas of expertise do you have outside of organizational capacity building?

Write research reports for organizations, primarily on workforce issues, but have focused on other topics. Reports are primarily qualitative research, but have also done quantitative research. Often use online survey tools and conduct interviews for clients.

Current resume and client list are included in Consultant Directory Supplemental Materials.

Third Space Studio – Meredith Emmett and Heather Yandow

General Information

Date: December 22, 2010

E-mail: meredith@thirdspacestudio.com
heather@thirdspacestudio.com

Website: www.thirdspacestudio.com

Phone: 919-416-1802 and 919-780-4117

Address: 1301 Alabama Ave.; Durham, NC; 27705

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant participated in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Mission, Vision, and Strategy	<p>NC Center for Nonprofits Raleigh, NC Trisha Lester Vice President 919-790-1555x104 tlester@ncnonprofits.org</p> <p>NC Sustainable Energy Association Raleigh, NC Ivan Urlaub 919-832-7601 ivan@energync.org</p>
Governance and Leadership	<p>NC Center for Nonprofits Raleigh, NC Jane Kendall 919-790-1555x100 jkendall@ncnonprofits.org</p> <p>NC Center for Women in Public Service Raleigh, NC Dana Jennings CEO 919-832-9996 DJennings@nccwps.org</p>
Resource Development	<p>Toxic Free NC Raleigh, NC Fawn Pattison Executive Director 919-833-5333 fawn@toxicfreenc.org</p> <p>NC Conservation Network Raleigh, NC Brian Buzby Executive Director 919-857-4699 x100 brian@ncconservationnetwork.org</p>

Examples of organizational capacity building projects you have completed.

1. Six North Carolina organizations had a great opportunity to build a program to strengthen their fundraising capacity. With a history of working together and strong support from a foundation, the only piece they were missing was a plan of action. Partnering with Third Space Studio, they developed a comprehensive three-year, \$800,000 project that included staff for each organization, consulting

resources, and funds for joint organizational projects. The project was fully funded and is in its final year of producing significant results for organizations.

2. An established grassroots organization needed a fundraising strategy that would help them grow their organization and achieve their mission. Meredith Emmett of Third Space Studio interviewed long-time supporters of the organization and worked with a team of board members to identify ways for the organization to build its fundraising. As result of their work with Third Space Studio, the organization has diversified their income base and grown their individual donor contributions from less than 20% to 35% of their total budget. More importantly, every action that they take to engage people in their mission is now an opportunity to raise funds.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

- *creating strategic plans that fits organizational needs*
- *identifying organization's desired impact and the right strategies to achieve it*
- *creating fundraising plans*
- *designing and facilitating meetings*
- *organizing trainings for staff and Board*
- *facilitating Board evaluations and annual retreats*

What other areas of expertise do you have outside of organizational capacity building?

- *creating campaign plans*
- *developing innovative programs with multiple partners*
- *coaching Executive Directors and new fundraising staff*
- *coordinating and facilitating networks and collaboratives*

Current bios and client list are included in Consultant Directory Supplemental Materials.

Trilithon Partners – John Klein

General Information

Date: August 31, 2010

E-mail: john@trilithonpartners.com

Website: www.trilithonpartners.com

Phone: 919-349-4494

Address: 211 Greensview Drive; Cary, NC; 27518

Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant was not invited to participate in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work given their expertise is limited to a particular area of specialty.

Experience

Check Areas of Specialty:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers

Resource Development	<p>North Carolina Symphony Raleigh, NC David Chambless Worters President / CEO 919.733.2750 worters@ncsymphony.org</p> <p>Leadership Triangle Durham, NC Winkie LaForce Executive Director 919.433.1577 winkie@leadershiptriangle.com</p>
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Examples of organizational capacity building projects you have completed.

Project #1: Performing Arts

Background

The performing arts have been one of the casualties of the recent economic downturn. Significant decreases in contributions and attendance have forced most arts organizations to scale back performances and exhibits, while some have closed altogether. However, industry experts contend that this decline began before the financial downturn. Why? Evolving consumer tastes, obscure and challenging performances, escalating costs and the influence of digital access are just some of the reasons. In short, there is no simple answer. To better understand this challenge, some organizations went back to the basics.

Challenge

The nonprofit organization was painfully familiar with this trend. A unique public-private trust, this organization watched as subscriptions dropped 25%, single ticket sales slid, donations decreased and budgets were slashed. Yet, website traffic continued to grow and a newly-implemented e-mail blast program was showing results. What was happening? As a result, Trilithon Partners was hired in the summer of 2009 to take a comprehensive view of their audience development function and to determine what steps were necessary to shift these metrics in a positive way. And more importantly, were some old habits worth picking up again?

Solution

Among the array of changes, the organization:

- *Refocused their brand identity to clear, consistent and contemporary exposure across all lines of consumer engagement*
- *Saw the positive relationship between promotion (PR/advertising) and ticket sales, and marketing budgets were re-established to promote awareness and continuity*
- *Refined their digital communication to reach best prospects, with the appropriate mix of “sell” and general messages*
- *Applied an old custom of communicating to long time subscribers and patrons in a more consistent way*

Project #2: Financial Services

Background

Service industries typically have a clear value proposition – expert advice, based on people, process and a unique point of view. Since that proposition is commonly shared within market segments, the key to success is to build overall awareness and

differentiation at the same time. The principals began promoting their financial services in Fall 2009, with a new brand identity, advertising and a redesigned website. This promotion was taking place during the recent economic recovery, in a very crowded field – less than optimal circumstances for any company, much less one specializing in financial management.

Challenge

While the anecdotal evidence suggested the new campaign was working, the partners were looking for something more empirical – as in leads, contacts, engagements – as a direct relationship to the promotional activity. Since the customer journey from awareness to purchase can take some time, we focused on bridging the gap between awareness to consideration by building direct traffic to their website. This Search Engine Marketing program was launched through Google Analytics, employing a fixed / low daily expenditure. The challenge was to find the right mix of message, keywords, geography and competitive presence to generate a discernable and positive result. The results were manifold.

Solution

- Metrics – the SEM program generated over 300 new and qualified visitors to the company and over 120,000 targeted search impressions over a three month period – all based on an extremely limited budget and geographic scope. Each new visitor cost the organization \$2.50.
- Messaging – through SEM, the client was able to learn and refine their messaging strategy, based on real-time activity. This learning was applied to their traditional advertising as a result.
- Business Strategy – through the campaign, the client developed a better understanding of their market position, competitive set, potential – and most importantly – what part of their business to focus on, based on empirical data.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

Analysis

We review target audiences (since most companies have many constituents), look for areas where they group or “segment” and dig into demographic and attitudinal trends. In addition we observe other organizations competing for that audience, and what the upside value of that audience is. That value is reflected in how it contributes to growing your audience and maintaining financial stability. Once this review is complete, we will create your market positioning – identifying your market with the best potential, your unique qualities and competitive advantages; all expressed in a clear and powerful way.

Execution

After the analysis is complete, we will develop all components of the communication plan, including:

- Brand Identity
- Creative Development
- Social Media programs
- Digital marketing
- Advertising/media placement
- Direct marketing
- Public relations
- Event management

In addition, we will execute all of these components – within our services, in conjunction with external freelance talent or as part of your internal team – in the best combination to serve your needs.

Measurement

In the current media world, everything is related to everything else. Posts on Facebook could have a positive impact on advertising and PR, which could boost sales and donations. The operative word is “could”, since each organization has its own unique mix of effectiveness. Looking at all marketing efforts – in combination and in isolation – can help understand what’s working and what can work better. This includes:

- Communication exposures
- Brand awareness
- Sales/donations
- Engagement

What other areas of expertise do you have outside of organizational capacity building?

Trilithon Partners also gives back. Since the beginning, we’ve been active members of non-profit boards – donating our services to organizations dedicated to serving the community. Our involvement contributes to their growth, brand development and financial success. Some details:

KidZNotes is a start-up entity committed to bringing music instruction to underprivileged children in Durham, NC. Based on the successful El Sistema model in Venezuela, KidZNotes will be served by one of the first El Sistema USA fellows and will partner with public and private entities to enrich the lives of kids in Durham County – and ultimately, the state of North Carolina.

Leadership Triangle is a 15 year old organization dedicated to promoting unity and cooperative efforts in Wake, Durham and Orange Counties. They conduct learning programs for worthy civic and emerging corporate leaders throughout the Triangle.

Philanthropy Journal (www.philanthropyjournal.org) is one of the leading sources for nonprofit news, opinion and advice in the US. Articles on nonprofit branding and communications written by John Klein have been featured consistently over the past year.

Youth Empowered Solutions (YES!) – Bronwyn Lucas

General Information

Date: April 21, 2011

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Do you have experience consulting with nonprofit agencies in the Triangle area?

This consultant was not invited to participate in the annual John Rex Endowment information session for consultants conducting comprehensive organizational assessments and other capacity building work given their expertise is limited to a particular area of specialty.

Experience

	Comprehensive Organizational Assessment	Mission, Vision, and Strategy	Governance and Leadership	Resource Development	Strategic Relationships	Internal Operations and Management	Program Delivery and Impact	Organizational Restructuring or Mergers
Check Areas of Specialty:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

References are provided upon specific request.

Examples of organizational capacity building projects you have completed.

Youth Empowered Solutions (YES!), using its Youth Empowerment Appraisal facilitated an assessment of a Wake County youth-serving organization. The YES! Appraisal engaged all aspects of the organization, from Board to clientele, in developing a quantitative and qualitative assessment of current capacity for youth engagement. As well, the YES! Appraisal helped to uncover strategic opportunities for the organization grow it's capacity, which resulted in an organizational culture shift.

YES! worked with a Wake County youth-serving organization to facilitate a focus group of teen volunteers in order to build their investment within the that organization and increase their capacity as key stakeholders of that organization to effectively act as leaders. The focus group engaged key youth stakeholders in examining organizational structure and developing strategic action steps for the organization moving forward. As a result of the focus group, the organization shifted its culture towards a shared decision-making model of youth engagement.

Other Areas of Expertise

List any other areas of expertise relevant to organizational capacity building.

YES! operates within a circular (as opposed to hierarchical) organizational design, which represents a shared power and decision-making philosophy between youth and adult staff. This organizational design is both rational and functional where youth staff do report inward to adult staff, but rather than being situated at the bottom of the organization, they surround it, encompassing the organization. YES!' uses this experience, operating within this circular infrastructure, to grow the capacity of other youth serving organizations through assessment, training and technical assistance.

What other areas of expertise do you have outside of organizational capacity building?

YES! uses a central Youth Empowerment Model (The YES! Model) to empower youth, in partnership with adults, to create community change. Using The YES! Model, YES! youth staff act as program designers, trainers, advocates, and evaluators. The YES! Model is built upon three prongs (Skill Development, Critical Awareness, and Opportunities) and has been proven to effectively engage young people at a deeper level to be community change-agents. YES! youth and adult staff provide training to other adults, youth, and organizations to increase their capacity to engage young people effectively through utilizing the YES! Youth Empowerment Model.