



## Coalition Effectiveness Consultant Directory

The John Rex Endowment Consultant Directory includes consultants that have identified themselves as providing services to coalitions (a.k.a. task forces, collaboratives, councils, etc.). Consultants were identified through agency contacts 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.**

### **Robert Albright**

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- *Experience consulting in the Triangle area*
- *Experience consulting with coalitions*

Robert Albright is Associate Director of the Collective Impact Forum, a field-building partnership between FSG and the Aspen Institute Forum for Community Solutions. Robert cares deeply about bringing multiple actors together from different sectors to solve complex social problems. He has deep expertise in cross-sector partnerships and strategy/evaluation for nonprofits, foundations, and other social sector partners. He provides coaching and technical assistance to a range of collaboratives (in the Research Triangle and around the country) on topics including building interest and momentum for cross-sector collaboration, how to evaluate collective impact, how to structure and support collaborative efforts, and how to engage multiple sectors in the planning and implementation of collective impact. He has conducted various workshops and spoken at local, regional, and national convenings on collective impact. Robert also facilitates the Collective Impact Funder Community of Practice, which provides a series of in-person and virtual meetings throughout the year for private foundations, community foundations, United Ways, corporate foundations, public sector funders, and other funders to deepen peer relationships, learn about effective strategies for investing in collective impact, and improve their practice as funders in collective impact.

Prior to joining the Collective Impact Forum, Robert worked on numerous collective impact consulting engagements with FSG, including a collective impact project focused on economic competitiveness in Northeast Ohio and a statewide collective impact effort to transform New York State's juvenile justice system. Other previous clients include the Bill & Melinda Gates Foundation, Ford Foundation, and Rockefeller Foundation. Robert holds an M.B.A. from Northwestern University's Kellogg School of Management, where he earned the Dean's Distinguished Service Award, and a B.A. in Journalism & Mass Communication from the University of North Carolina, Chapel Hill, where he was the senior class vice president. He is a Board member of the United Way of the Greater Triangle.

## **Amy Belflower Thomas**

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- *Experience consulting in the Triangle area*
- *Experience consulting with coalitions*

The North Carolina Institute for Public Health (NCIPH) puts public health in action by serving as a bridge between academia and public health practice partners including state and local public health agencies, healthcare, non-profit, and community organizations.

Collaboration is at the heart of NCIPH's mission. As part of the UNC Gillings School of Global Public Health, we value our relationships within the School and with diverse organizations across North Carolina and the country. Because of this, NCIPH can go beyond simply providing standard and expected services to partners, but also develop flexible and innovative solutions to projects.

The North Carolina Institute for Public Health's work is interdisciplinary with staff from a diverse range of fields, including public health, medical sciences, GIS technology, and more. NCIPH carries out its mission through three core departments:

### Continuing Education

- NCIPH offers face-to-face courses, trainings, and conferences for public health professionals.
- We maintain an extensive online training website with free e-learning modules.
- We also offer formal training in leadership development, business development, evidence-based public health, public health nursing and other topics.
- Because of our reach within the School of Public Health and other allied health programs at the UNC Chapel Hill, we can easily develop new training programs based on client need.

### Engagement

- Our highly accomplished staff publishes and presents scholarly practice-based work. Staff also regularly participate in conferences and best-practice sharing initiatives so that projects benefit from the latest in evidence-based approaches and information.
- We link students to research projects and internship-type opportunities.

### Technical Assistance

- We use cutting edge methods and technology to conduct field data collection- a great way to gather local-level data and community opinions.
- We also conduct community health assessments with local health departments and hospital systems.
- NCIPH serves as the administrator of the NC Local Health Department Accreditation Program on behalf of the NC Association of Local Health Directors.
- We provide data translation and innovative GIS and spatial mapping tools to make local data easier to understand by local agencies and the communities they serve.
- Because of our reach within the School of Public Health and other allied health programs at UNC Chapel Hill, we can easily incorporate subject matter expertise into community coalition/facilitation projects.

## **Beth Bordeaux & Stan Holt**

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- *Experience consulting in the Triangle area*
- *Experience consulting with coalitions*

Beth Bordeaux is analytical, insightful, passionate, dedicated, and genuine. She cares about organizations, their systems, metrics, budgets, and processes . . . because ultimately, she cares about people. She knows that, to provide community members with the support they need to live and to thrive, human service systems must be strong from the inside out. And she knows how to make this happen.

Beth is an executive leader with over 28 years of nonprofit and local government experience working across various levels of organizations and service systems from Volunteer to Social Worker, Program Director, Evaluator, Funder, Community Developer, Executive Director, Advocate, Coalition Builder, Consultant, Coach, Board Member, and more. She has worked in programs supporting individuals and families with many types of needs: mental health, developmental disabilities, substance abuse, housing, childcare and child care quality, early intervention, maternity care, domestic violence, faith support, education, and basic needs such as food, shelter and housing.

In all her work, Beth begins with assessment and understanding of what is now and what is desired to be. This comes from the old Social Work philosophy of “start where the client is.” From this point, Beth brings a systems perspective to broaden the thinking process, strengthen relationships and trust, and bring the vision of high level impact into focus. She has successfully worked with coalitions and collaborative groups throughout her career – working on statewide and county level initiatives to end homelessness, county and regional efforts to improve child care and child care quality, collective initiatives to improve community health and well-being as well as affordable housing and work with faith communities in designing and clarifying multi-church and cooperative church models.

After 28 years in the nonprofit sector as a development director, executive director, and a grant maker, Stan Holt started consulting in March of 2018. He uses the collective impact framework as a lens for working with collaborative partnerships and coalitions. He believes wholeheartedly that the complex social challenges faced by our community takes more than one agency or more than one sector to solve the problem. He meets organizations and partnerships where they are. Through strong listening and facilitation skills he works to create a shared vision and purpose. His lifelong commitment to the poor and underserved in our communities serves as an inspiration to all.

## **Philip Bors**

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- *Experience consulting in the Triangle area*
- *Experience consulting with coalitions*

Healthy Places by Design advances community-led action and proven, place-based strategies to ensure health and well-being for all. We do this by partnering with nonprofits, local leaders and funders to create healthy communities.

Since 2002, Healthy Places by Design has provided long-term, extensive, and direct technical assistance, coaching, and consultation to nearly 200 community partnerships in 30 states, the District of Columbia, and Puerto Rico, and has worked with more than two dozen philanthropic organizations focused on healthy community change. Starting in 2014, we have also worked intensively with six municipalities in Wake County to advance community health through local government.

At Healthy Places by Design, we believe in the power of people to make positive change in their communities. We also understand the important role of people, professionals, advocates, leaders, and community members working with and within coalitions and multi-disciplinary partnerships to advance health and well being. We know that one size does not fit all organizations or coalitions. Our approach supports coalitions by helping them move forward from where they are in developing a culture of learning, practicing facilitative leadership, and thinking intentionally about sustaining their important work.

Healthy Places by Design can support you through long- and short-term engagements. We can work with your group and/or organization to build capacity for resident engagement, strategic planning, advocacy, and community change initiatives. We have assisted coalitions and multi-disciplinary partnerships to build and maintain healthy collaborations that achieve common goals. Our approach may include one-on-one consultations, group meeting facilitation, presentations, internal surveys, and coaching. Healthy Places by Design uses its Community Action Model with six Essential Practices for sustainable community change as a framework. To help advance learning, we also share evidence-informed and practice-based resources and community success stories to help coalition leaders see their work in a broader context among state and national peers.

## **Meredith Emmett and Heather Yandow**

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- *Experience consulting in the Triangle area*
- *Experience consulting with coalitions*

Founded in 2001, Third Space Studio is a consulting practice that partners nonprofits – and collaboratives – as they navigate current reality with bold strategies and leadership. We believe in the power of focus, alignment, and courageous leadership.

Examples of our work include:

- Facilitating and coordinating large-scale networks including the Initiative for Responsible Mining Assurance and Vital Lands Illinois. We helped to design the Healthy Kids Collaborative hosted by the Down East Partnership for Children.
- Designing and delivering capacity building initiatives including the Nonprofit Leadership Academy of the Blue Cross Blue Shield of NC Foundation and the Executive Leadership Program and Leading Coalitions and Networks offered by the Institute for Conservation Leadership.
- Coaching executive directors as they lead their organizations to adapt and deliver bold impact. We have also coached network coordinators.
- Guiding the creation of strategic frameworks for Democracy NC, Blueprint NC, Covenant with NC's Children, NC Center for Nonprofits, and the NC Solar Center, among others.

The lead consultants at Third Space Studio are Meredith Emmett and Heather Yandow. Meredith Emmett is a strategist, facilitator, coach, and trainer known for her interactive and creative ways of engaging people in meaningful conversation and thoughtful action. She inspires leaders to use their strengths and successes to create bold impact. Meredith has over thirty years of experience in the nonprofit sector as an executive director, board chair, board member, volunteer, and donor. She currently serves on the boards of Democracy NC and the Ellerbe Creek Watershed Association, the nonprofit focused on the creek in her backyard. Meredith was recently certified in the Case-in-Point method of teaching adaptive leadership by the Kansas Leadership Center.

Heather Yandow is passionate about helping organizations go from good to great through strategic planning, board development, business model design, and implementing fundraising strategies. Heather brings more than 15 years of experience as facilitator, coach, trainer, outreach coordinator, coalition leader, project manager, and fundraiser to Third Space Studio. During her nine-year tenure at the NC Conservation Network, she was responsible for developing sustainable strategies to diversify revenues, building a comprehensive set of benchmarks to track programmatic progress, and coordinating a large and diverse coalition of groups working on water issues. Heather is a founder of the Beehive Collective, a giving circle in Raleigh, and is a former board member of Democracy NC and ncyt: NC's Network of Young Nonprofit Professionals. Heather holds a certificate in Nonprofit Management from Duke University.

## **Jeanne Frazer**

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- *Experience consulting in the Triangle area*
- *Experience consulting with coalitions*

vitalink has significant experience building brands, developing marketing strategies, and changing perceptions for non-profits, government agencies, and universities. We have developed and managed campaigns that combine multiple entities under one umbrella to make the most of the resources.

In a recent project, we worked with a council to complete research and build consensus on a new brand and brand rollout plan. The council included members from several very diverse counties. Our process included engaging with stakeholders and working to define a strategic marketing plan to accommodate a variety of needs.

vitalink partners with our clients to develop strong branding and marketing platforms based on research. Our goal is to deliver innovative and cost-effective strategies and solutions that change perceptions, inspire action and generate results. Our clients tell us they love how we listen and partner with them bringing out the best in our teams. They also say we bring a keen insight on how to use research strategically, align stakeholders, and make their brands come alive in our creative and strategic approach and implementation.

Our services include research, branding, creative (including logos, digital and print ads, marketing collateral, etc.) strategic marketing plans, content development, public relations, video production, digital campaigns, community partnerships, social media, media buys, analytics and optimization, ROI and engagement metrics, and more.

Frazer Enterprises, Inc. DBA vitalink® is a woman-owned business based in Raleigh. We have collaborated with clients since 1996 to generate results. Current and past clients include The Dereck Whittenburg Foundation, Raleigh Rescue Mission, the Lower Savannah Council of Governments, Sisters Inspiring Sisters, Inc., Foundation for the Renewal of Eastern North Carolina, Adult Learners NOW, NC State University and Shaw University.

vitalink is a founding partner of HBCUgrow, where we and our partners host a higher education marketing and website conference annually. In addition, we provide periodic training for non-profits and small businesses through our Innovation Lab series.

## **Katherine Locke**

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- *Experience consulting in the Triangle area*
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At TCC Group, we are passionate about helping the social sector achieve greater impact. Since 1980, we have developed strategies and programs that enhance the efficiency and effectiveness of foundations, nonprofits, corporate citizenship programs, and government agencies. From offices in New York City, Philadelphia, and San Francisco, we work with diverse clients from large funders and nonprofits to smaller organizations that want to tap our knowledge to determine pragmatic ways to address complex social problems.

Our consulting staff are excellent strategists, program developers, capacity builders, and evaluators. We have wide-ranging expertise and on-the-ground experience in fields such as education, arts and culture, community and economic development, human services, environmental conservation, and health care. We are critical thinkers, effective communicators, and skilled facilitators.

We typically engage with coalitions through our evaluation services and our capacity building services:

### **Evaluation of and for Coalitions**

We are a recognized field leader in evaluating policy and advocacy efforts and evaluating various aspects of campaign work such as strategic use of networks and building advocacy capacity at an organizational and field level. We have worked extensively with coalitions, and have published and presented in multiple venues on our work. We have worked to evaluate the effectiveness of coalitions and campaigns, developing and testing a model of coalition capacity ([http://tccgrp.com/pdfs/What\\_Makes\\_an\\_Effective\\_Coalition.pdf](http://tccgrp.com/pdfs/What_Makes_an_Effective_Coalition.pdf)). We have engaged in research to identify best practices for funders and advocates working on long-term advocacy campaigns ([http://tccgrp.com/pdfs/Effective\\_Strategies\\_to\\_Support\\_Advocacy\\_Campaigns\\_TCCGroup.pdf](http://tccgrp.com/pdfs/Effective_Strategies_to_Support_Advocacy_Campaigns_TCCGroup.pdf)). We also have worked to build the capacity of coalitions to evaluate their advocacy work.

### **Capacity Building for Coalitions**

Used by more than 5,000 nonprofits, the Core Capacity Assessment Tool (CCAT) is the leading assessment tool for measuring nonprofit effectiveness in relation to four core capacities—leadership, adaptability, management, and technical—as well as organizational culture. Nonprofits identify their lifecycle stage, receive a real-time findings report, and create a prioritized capacity building plan. CCAT interpretation sessions include a facilitated conversation with all who have taken the CCAT, led by a skilled TCC consultant; CCAT survey results are analyzed and discussed, so your organization's leadership is able to deepen its understanding of the CCAT findings, prioritize its most urgent needs, and develop a personalized action plan based on results. Interpretations can be provided to clusters of nonprofits exhibiting similar levels of capacity building readiness, those at the same life cycle stage, or to individual nonprofits.

## **Marty Martin**

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- *Experience consulting in the Triangle area*
- *Experience consulting with coalitions*

Unique among most consultants, I am a lawyer whose law practice provides a range of legal and tax services that affect nonprofit and tax exempt organizations. My experiences have covered the lifecycle of a nonprofit from start up to closing. I work with clients to solve their problems proactively and provide a blend of legal, tax, management, and governance experience that is integrated into my advice and recommendations.

My career in the nonprofit sector began as a volunteer with experiences that ranged from co-founding with responsibility for raising the initial funding of a small nonprofit to service on a voluntary national health association board of directors representing chapters in eight states. I have chaired several organizations and worked to develop leadership at a local, regional, and state level.

As a result of these experiences I returned to graduate school in mid-career and earned a MPA degree with a concentration in managing nonprofit organizations. As a consultant and trainer for nonprofit and tax exempt organizations I am the senior board governance instructor for the Duke Nonprofit Management program; a BoardSource Certified Governance Trainer; and a TCC Group CCAT facilitator.

I served as a member of the IRS Advisory Committee on Tax Exempt and Government Entities (ACT). This committee advises the senior IRS Exempt Organization Division leadership which is responsible for regulating the nonprofit sector nationally. Many recommendations from the ACT's annual report to the IRS Commissioner are implemented by the IRS. For a humorous look at one recommendation, read "The Case of the Disappearing Exempt Organizations Link on IRS.gov" and "Special Update: Thank You, IRS, For Returning EO's Missing Link on IRS.gov" which were published in the Nonprofit Quarterly magazine and are posted on their website or my firm website at [www.MartinLegalHelp.com](http://www.MartinLegalHelp.com)

As an example of coalition and task force work, I chaired the national task force which created the legal agreement which defined the legal relationship between the national Alzheimer's Association and at the time more than 220 individual association chapters nationwide. The agreement was adopted without modification by the national association and a majority of the chapters' boards of directors before it became the standard agreement which governed the association for more than twenty years. I wrote about this experience "Alzheimer's Association: Cooperation, Competition, or Consolidation" which was published in the Nonprofit Quarterly magazine and is posted on their website and my firm website at [www.MartinLegalHelp.com/publications.htm](http://www.MartinLegalHelp.com/publications.htm).

**Mary Moss**

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- *Experience consulting in the Triangle area*
- *Experience consulting with coalitions*

moss+ross is a strategic development consulting firm formed in January 2009 as an LLC by Susan Ross and Mary Moss. Our structure includes the two partners and a team of 18 diverse and skilled associates who both broaden and deepen the moss+ross toolkit. moss+ross is a full service firm offering assessment, strategic planning, leadership training and development, annual and capital campaign planning and management, executive search, research, interim staffing, and fundraising communications.

Over the past eight years, we have had the satisfaction of working with 137 different clients, with 61 of those clients having returned for additional engagements. While fundraising principles remain true across clients and projects, the reason that we are hired over and over again is our ability to stay fresh with our ideas and creative in our guidance. We have built our reputation on a custom approach to each engagement – an approach that harnesses client strengths, uncovers hidden talents and opportunities, and provides support for any challenges to get results. We are proud that our clients say their organizations are stronger at the end of our time together.

Knowing the Raleigh nonprofit landscape like we do, we believe that coalition building is the way forward to address some of our community's most pressing needs. We understand that coalition effectiveness is built on a platform of unilateral trust and support for each member organization to think through its individual and collaborative strategic needs and budgets. We have worked with coalitions through strategic planning, facilitation, fundraising planning, and grant writing. We welcome a conversation with you to see how we could support your coalition capacity building.

## **Ruth Peebles**

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- *Experience consulting in the Triangle area*
- *Experience consulting with coalitions*

The INS Group helps organizations create innovative solutions to build their capacity. We accomplish this by assessing, designing and implementing organizational development strategies that focus on improving effectiveness and enhancing the organization's sustainability. The INS Group provides the following organizational development services:

- Strategic planning
- Strategic fund development planning
- Project management
- Board development
- Board training on fundraising
- Grant writing
- Grant research
- Resource development audits
- Creation of resource development materials
- Grant writing and fundraising workshops
- Community organizing (facilitation, focus groups, public forums)
- Executive coaching

Ruth Peebles, President and Founder of The INS Group offers over 25 years of hands-on experience in nonprofit management, fundraising, organizational development and project management. Ms. Peebles served as the Executive Director for The Raleigh/Wake Partnership to End and Prevent Homelessness, as the Director of Development for Prevent Child Abuse North Carolina and Associate Director and Development Officer for the North Carolina Caring Program for Children. Ms. Peebles is an instructor for the Duke University Certificate Program in Nonprofit Management and served as an adjunct instructor for the School of Public and International Affairs Master of Public Administration Program at North Carolina State University. Ms. Peebles currently serves several local nonprofit boards and is a founding member of the Next Generation of African American Philanthropists giving circle.

The INS Group works directly with our clients to understand their specific needs and desired outcomes. We do not offer a one size fits all approach. Our approach and services are tailored to meet unique business objectives and organizational needs.

The INS Group actively seeks to help others and recognizes the value that each individual person can contribute to any organization. We are open to and initiate new ideas and ways of thinking. We are committed to being future-focused, responsive to nonprofit trends and entrepreneurial in approach to problem solving.

The firm has extensive experience working with coalitions. For example, The INS Group led year-long planning processes to develop strategies to end homelessness in Durham, NC, Wilmington and Greenville, NC. The firm coordinated and implemented community planning processes with community coalitions that included nonprofits, public officials and businesses and drafted 10-Year plans to end homelessness.

**Susan Sachs**

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- *Experience consulting in the Triangle area*
- *Experience consulting with coalitions*

Susan Sachs, MA, has more than 25 years of experience leading and working in collaborative community efforts across North Carolina. As a nonprofit Director she coordinated a faith-based collaborative to meet human need in rural Vance County in the early 1990's followed by a regional collaborative that served 9 counties around the Triangle providing seamless HIV/AIDS services to thousands of people living with HIV disease and their families.

Susan founded Starfire Consulting in 2001, a nonprofit organizational development consultancy, and has facilitated and supported collaborative efforts with a variety of nonprofits, local governments and academic institutions. Her training as a therapist and work as a coach to nonprofit leaders has been important in supporting organizations and their leaders as they navigate the often choppy and uncharted waters of collaboration to better meet human need and achieve economies of scale. The African Proverb: "If you want to go fast, go alone. If you want to go far, go together." synthesizes her philosophy when leading, facilitating and supporting collaborative, community-based/led efforts.

Specific areas of expertise include strategic planning, project/program planning, meeting facilitation, board and staff development, fundraising and grant writing/development.

Clients and collaborators have included: NC Department of Health and Human Services, Duke University Medical Center, The Conservation Fund's Resourceful Communities Program, The Duke Endowment's Rural Church Program and most recently the Kaleidoscope Project funded by the John Rex Endowment.

Susan received her undergraduate liberal arts degree from UNC-Chapel Hill and her graduate degree from North Carolina Central University in mental health counseling.

**Leslie Starstoneck**

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- *Experience consulting in the Triangle area*
- *Experience consulting with coalitions*

Leslie Starstoneck has served as a consultant to nonprofits for the past fourteen years and has been a Senior Advisor for the firm of Armstrong McGuire & Associates for the past three years.

Ms. Starstoneck understands the unique structures, operating cultures and decision-making strategies common to coalitions and collaboratives and the attendant challenges and opportunities they engender. She is a dedicated learner and listener, working to understand as much about the organization, its leaders and constituents as possible, understanding their goals, and meeting them where they are for the greatest impact.

Her engagements with Armstrong McGuire have included numerous coalition-capacity building engagements, including recent work with projects funded by the John Rex Endowment. She has consulted for many other membership organizations and coalitions in a variety of capacities including serving as an Interim Executive Director for NC Child, facilitating a board retreat between the NC Housing Coalition and the North Carolina Redevelopment Corporation facilitator and brings her own professional experience as a leader and policy expert serving as the Director of Public Policy for Jane Doe, Inc. in Boston, Massachusetts, and Executive Director of the North Carolina Domestic Violence.

Leslie understands the intersection of complex systems including child welfare and criminal justice and the role and necessity for advocates and nonprofit partners. She is a part-time Program Director at Adler University, a Chicago-based university dedicated to social justice, where she oversees their graduate degree program in nonprofit management for the online campus. For a complete bio, see <http://www.armstrongmcguire.com/about-us/our-team/leslie-starstoneck> or <https://www.linkedin.com/in/starstoneck/>

Armstrong McGuire & Associates is a full-service firm specializing in leadership development, planning, resource development, and assessment services for nonprofits. We believe that non-profits and their stakeholders share a common goal: to improve the lives of people in their community. We're in the business of supporting that goal. Since 2003, we have maintained an unwavering commitment to our core values of integrity, experience, relationships and results in our goal of exceeding the expectations of our clients.