



Proposal for

# Strategic Planning

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Primary contacts:

Brenda Asare | President & CEO | [basare@alford.com](mailto:basare@alford.com)

Cheryl Blanchette | Associate Senior Consultant | [cblanchette@alford.com](mailto:cblanchette@alford.com)



THE ALFORD GROUP™

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# Let's collaborate to strengthen Vera House!

## Summary of Proposed Service

The Alford Group is pleased to present this proposal for strategic planning services to Vera House. The Alford Group will collaborate with a core team of staff leadership to guide the process. The process will include a strategy design workshop, concept testing and workgroups – culminating in an actionable framework with goals, objectives, strategies, a timeline, budget and evaluation measures that will work **to further Vera House's anti-racist vision to deconstruct the premises of oppression and inequality.**

**Our approach will take a holistic view of Vera House's current and past successes and challenges, developing a time-bound roadmap that identifies detailed strategies to drive organizational impact.**

Diversity has been a core value of The Alford Group for more than 40 years. As a **woman- and minority-owned and -led firm**, we strive to strengthen the nonprofit sector through equity-forward partnerships, innovative strategies and meaningful engagement of diverse stakeholders in a **truly inclusive process.**

## Situation Overview

Vera House is a domestic violence survivor service organization providing direct services to the City of Syracuse and Onondaga County communities for more than 40 years. Today, Vera House recognizes that the next three years will be pivotal for the

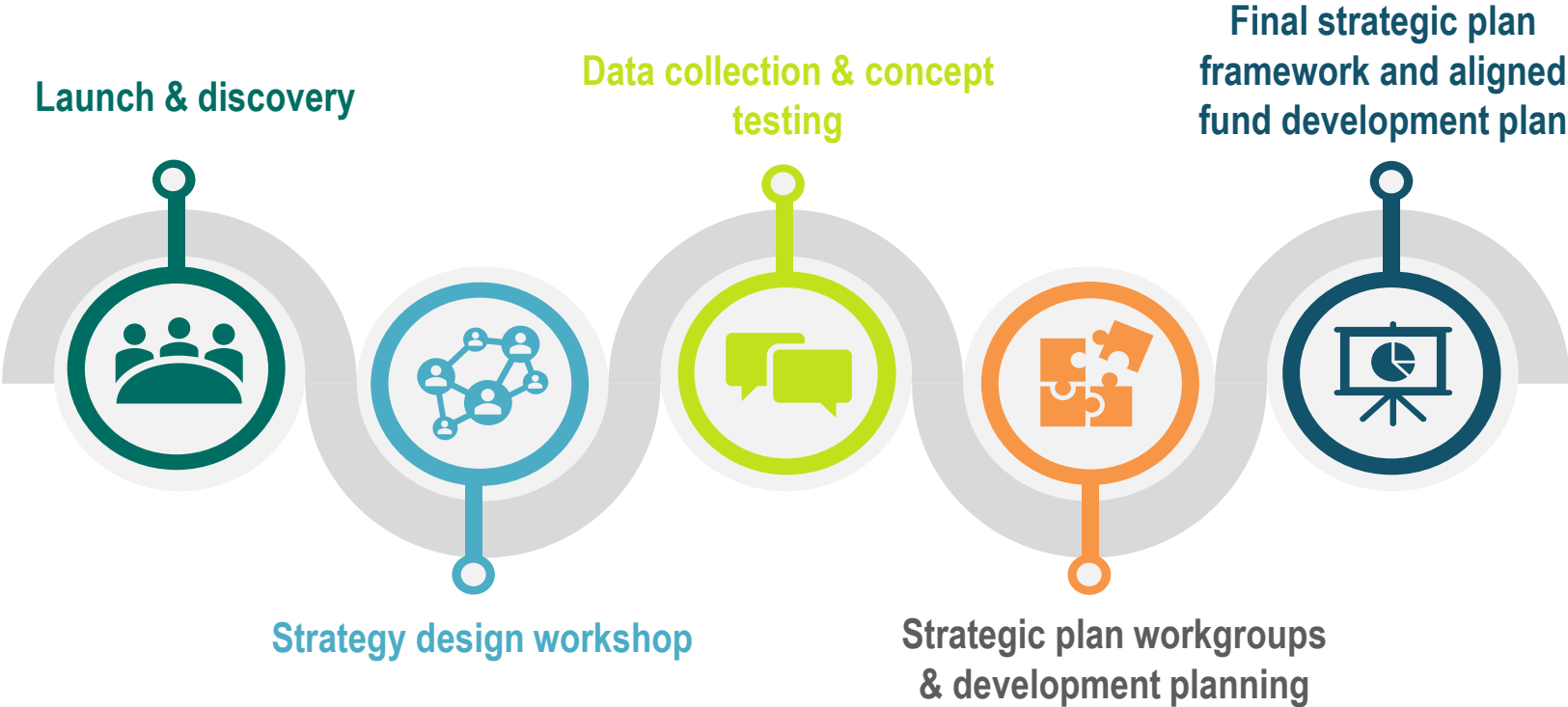
organization and thus a strategic planning process is needed to ensure the long-term success and vitality of Vera House. Leveraging the team's collective work and eagerness to continue to transform current oppressive systems, The Alford Group will guide Vera House in a collaborative, transparent and engaging process that incorporates the input of all key constituent groups.

## Your Results

- A reaffirmed or refined **organizational purpose**
- **Alignment** of the existing anti-racist framework with Vera House's pathway into the future
- Greater clarity on if/how specific **programs and initiatives** should be explored as part of Vera House's future plans
- **Ownership** of the decided-upon goals and plans by the entire team
- **Engaged external stakeholders** who will be more invested in Vera House's vision for becoming anti-racist
- Deepened commitment to advancing **diversity and equity-centered philanthropy**
- A strong foundation from which Vera House can build **sustainable, long-term operations**, advance the organization's mission, and continue to grow in the years ahead

# Service overview

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Total Timeframe: 4-5 months, starting in early 2022

A detailed month-by-month project timeline will be created at the launch of the project.



# Launch & discovery

The Alford Group team will begin the engagement by working to **align with Vera House's existing anti-racist framework** in accordance with Vera House's pursuit to continue to activate as an anti-racist organization. The work will begin with a launch meeting to establish our combined approach to this work and how we will handle sensitive or confidential information and **create a brave space for dialogue.**

Your Alford team will then review materials from the **recent internal assessments**, including data from the completed **racial equity policy analysis**. We will also gather additional information about Vera House's current operations, structure, previous and ongoing discussions with constituents, and review any anti-racist policies and statements.



Drawing from the already-created anti-racist framework, assessments and related internal and external activities, your Alford team will pay special attention to the issue areas of **succession planning** and deepening existing and cultivating new **philanthropic partnerships**, identified as priority issue areas for Vera House.

## Activities—The Alford Group:

- Establish a core team of board and staff leaders to work together throughout the engagement to ensure progress and fidelity to the timeline. This team would be comprised of approximately 5-7 individuals who will meet virtually throughout the process.
- Convene an initial planning meeting with the core team to launch the process; confirm the scope of service, timeline and deliverables; and identify stakeholders to engage throughout the process.
- Familiarize ourselves with Vera House's key data and materials, including (in addition to those already mentioned) hiring and retention policies, program design and delivery, program admissions policies, communications with the broader community and anti-racism-centered policies and statements.



# Strategy design workshop

Working closely with Vera House, your Alford team will identify potential strategic areas for the core team (and any additional stakeholders in attendance) to consider during a strategy design workshop. During the strategy design workshop, your Alford team will facilitate a series of discussions and exercises aimed at developing both **(a) foundational guidelines and guardrails for the strategic plan** and **(b) key strategies and concepts** that will generate excitement and impact.

These exercises may include – but are not limited to – **reviewing the anti-racist framework**; reaffirming or revising the mission and vision of Vera House; **identifying oppressive mental models**, policies, protocols, etc.; revisiting the four already-outlined strategic priorities, including **fundraising and new philanthropic partnerships**; **succession planning**; and beginning to outline a strategic pathway forward for Vera House.

Following the strategy design workshop, your Alford team will organize and flesh out the draft strategic plan framework – including key objectives and strategic concepts – for core team review and testing with constituents.

## Activities—The Alford Group:

- Facilitate a half-day strategy design workshop for the core team and potentially others in leadership or partnership roles with Vera House. During the workshop we will:
  - Review Vera House’s current mission and vision.
  - Discuss how well Vera House’s mission and vision statements reflect the organization’s purpose and intended impact, including the intention of **being an anti-racist organization**.
  - Identify three-to-five future organizational objectives and three to five strategies for each objective.
  - Begin to develop primary action steps for each strategy.





# Data collection & concept testing

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**Focus Groups:** Focus group discussions help prioritize goals and strategies for Vera House. Through focus group discussions, we gain the perspective of donors and audience members, former and or current board members, other volunteers and community partners. The focus group discussions explore perspectives of the organization, obstacles to deeper engagement, and support for the strategic direction and vision.

**Small Group Interviews:** The Alford Group will develop a comprehensive interview questionnaire and conduct confidential, small group interviews with diverse and representative external stakeholders, **such as volunteers, strategic partners and domestic violence survivors.** The purpose of these interviews will be to obtain:

- Points of view on the current and potential value proposition(s) Vera House can offer donors, audience members and the broader constituency.
- Perspectives on Vera House's current and potential priorities, including new programming, expanded services and specific **actions to become anti-racist.**
- Insight into internal and external challenges and opportunities Vera House has in carrying out its work and meeting its strategic goals.

## Activities—The Alford Group:

- Design facilitation guides for use during focus groups and small group interviews in order to:
  - Solicit feedback on potential strategic focus areas.
  - Prioritize issues and opportunities identified.
  - Surface perspectives on issues and opportunities that Vera House should pursue in its forthcoming strategic plan.
- Facilitate 2 focus group discussions of 8-12 participants each.
- Facilitate 2 small group interviews of 4-7 participants each.

## Deliverable:

- Counsel on how to use the data gathered in shaping, vetting, and communicating Vera House's strategic plan.



# Strategic plan workgroups

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To take the strategic plan from concept to reality, your Alford team will facilitate discussions and working sessions with staff to vet and refine the strategic plan framework.

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Once the foundational framework is set, we will work in groups to articulate what Vera House will do and how it will proceed. The workgroups will leverage the findings from the strategy design workshop and one-on-one interviews to engage core team members, as well as other appropriate staff, volunteers and board leadership.

This critical step codifies the strategic plan as a **series of active organizational intentions** rather than a set of passive ideas or blueprints. Your Alford team provides significant counsel and technical support during, before and after the workgroup sessions to ensure that stakeholders can fully complete the strategic planning matrix and surmount any design challenges or missing information we encounter along the way.

## Activities—The Alford Group:

- Facilitate a half-day (4-hour) workgroup session with those anticipated to be responsible for implementation of the organizational objectives.
- Review findings and conclusions from primary research efforts, including focus groups and interviews.

- Discuss refinements to strategic plan framework.
- Break into three to five workgroups (one for each organizational objective and **one for the development team**) and identify primary action steps, develop metrics to measure progress, and identify the human and financial resources necessary to implement the objective over the next three to five years (timeline to be determined).
- Review and respond to the findings from the interviews and survey. Refine the organizational objectives based on findings from this primary research.

## Deliverables:

- Populated strategic planning matrix, including refined objectives, strategies, action steps, responsible parties, revenue and expense implications, timelines and corresponding evaluation measures.
- Outline for a **Fund Development Plan**, aligned with the strategic plan pillars, to be further developed as part of the planning process (see page 9).



# Fund Development Plan

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Vera House will have an actionable funding plan that directly aligns with the organizational strategy and supports full engagement in the strategic plan.

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The Alford Group will assist the Development team during its workgroup (page 8) to begin to outline the framework for a Fund Development Plan that mirrors the strategic pillars identified during the Strategy Design Workshop. This step in the process will ensure the Development department is fully aligned with the overarching strategic plan and the roles, responsibilities and duties are clearly defined.

To create the most accurate Fund Development Plan, we will conduct Alford Analytics to assess Vera House's donor data (see page 10). Following the workgroup, your Alford team will meet with the department head (and key team members) to review the data analysis and continue to flesh out the framework, taking it from an outline to an actionable plan. This will include developing the timeline, budget and staff assignments to bring the plan to life.

Your final Fund Development Plan will include clear, measurable goals and objectives broken down by fundraising sources with fundraising strategies for sustainable growth.

## Activities—The Alford Group:

- Facilitate up to four meetings with the department head and/or key Development team members.
- Create up to two drafts of the Fund Development Plan.
- Advise the completion of the plan and aligning it with the overall strategic plan.

## Deliverable:

- Operational and actionable Fund Development Plan.





# Fund Development Plan: Alford Analytics

## Alford Analytics

The strongest Fund Development Plan for Vera House will be one rooted in data. To obtain a 360-degree view of exactly how donors are engaging with Vera House, and to gauge donors' philanthropic behavior and Vera House's overall fundraising effectiveness, The Alford Group will conduct donor data analytics.

Different from wealth screening, Alford Analytics will assess and identify recent and historic trends and gaps in giving that may be relevant to strategy and implementation.

Utilizing dozens of specific data points over multiple fiscal years, Alford Analytics will map out the donor journey (how donors are acquired, how long they stay, when they peak, how and when they increase to major giving) and much more.

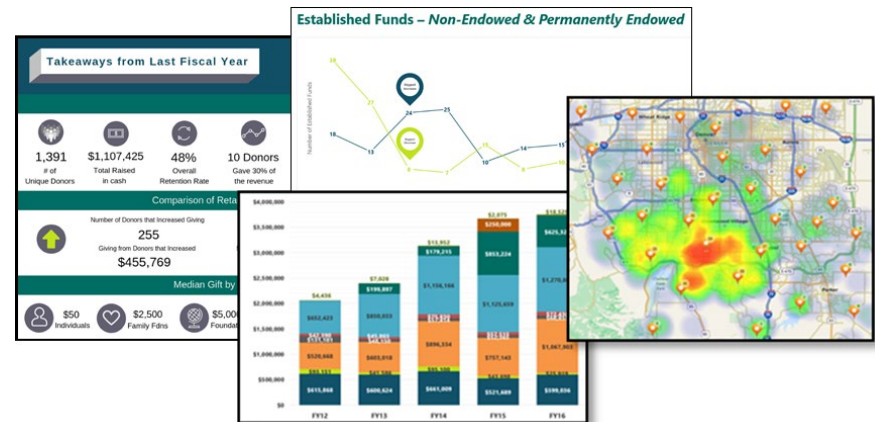
The analysis will return a full set of insights relevant to the campaign, create a shared understanding of the development program and spark creativity.

## Activities—The Alford Group:

- Guide Vera House staff in running two queries and two exports from the donor database.
- Conduct Alford Analytics and analyze donor data through proprietary software that will visually display revenues from each giving level and constituency group.
- Review preliminary findings with Vera House.

## Deliverables:

- Findings report that reveals donor trends and areas of opportunity.





# Finalize plan and framework

Maintaining the focus on anti-racism and anti-oppression, your Alford team will work with Vera House to finalize the materials the organization will need to adopt, launch and implement its strategic plan successfully, mindful of potential of obstacles that might be encountered.

## Activities—The Alford Group:

- Facilitate the final core team planning meeting.
- Review, refine and complete the strategic framework among all necessary decision-makers.
- Include **measurable objectives** that are aligned with programs and tied to organizational goals, including Vera House's commitment to becoming an anti-racist organization.
- Assist staff leadership in **key presentations** of the new strategic framework to Vera House.
- Work closely with Vera House leadership to determine financial and other resource requirements associated with the goals. Align the strategic framework with current and projected organizational capacity.
- Create an implementation plan with **budget projections, timeline, action steps** and responsible parties.
- Build a measurement framework and **dashboard to track and report progress** toward strategic success and the dismantling of the white supremacist foundations of Vera House.
- Finalize the process for presentation and adoption of the strategic plan.

## Deliverables:

- A functional three-year strategic framework in the form of a matrix. This document will include:
  - A strategic framework that clearly articulates Vera House's anti-racism, anti-oppression and organizational objectives and strategies.
  - Affiliated timelines and specific action steps for each organizational objective and strategy.
  - Engagement strategies to ensure an equity-forward plan that removes oppressive and harmful protocols for staff and those Vera House serves.
  - Integration of **succession planning** into the action steps and timeline.
  - Steps to create **new philanthropic partnerships** that align with the goals of dismantling oppression and systemic racism.
  - An implementation plan that includes action steps, responsible parties, progress/success metrics and dashboard, a task timeline and a projected budget framework required to support the strategic plan.
- Two-hour **check-in meeting**, one year from completed strategic plan to assess progress and determine strategic changes as needed.

# Your commitment

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## Activities—Vera House:

- Participate fully in all meetings. Assemble appropriate representatives to meet with The Alford Group team as necessary throughout the process.
- Manage logistics and provide resources for all meetings, including scheduling the date, time and location.
- Provide all requested materials to The Alford Group.
- Schedule small group interviews and focus group discussions.
- Contribute to and approve research questions and instrument design for interviews.
- Ensure all staff and board members are aware of the strategic planning process.
- Complete all strategic planning documents/tools provided by The Alford Group. Work closely with The Alford Group to finalize the strategic framework and aligned Fund Development Plan.
- Review and respond to all materials provided by The Alford Group to ensure understanding and the organization's ability to move forward.
- Drive activities as outlined in the scope of work and ensure the work process progresses according to the agreed-upon timeline.



# Cost proposal

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**Strategic Planning Services**.....\$54,550

## Professional Fees

These fees include time spent on- and off-site for preparation, meetings, telephone calls, normal postage, materials preparation, training, planning, writing reports, research and any other assignment performed on behalf of Vera House within the scope of this proposal. The Alford Group does not charge for travel time. Vera House will be invoiced monthly.

This fee is based on the project progressing according to the agreed upon project timeline and length of service. Any adjustments to the timeline or scope of service will result in a mutually agreed upon additional fee.

## Expenses

The Alford Group will invoice Vera House for any reasonable out-of-pocket business expenses incurred while providing the services described in this proposal. This includes, but is not limited to such expenses as airfare, rental vehicles, hotel accommodations, mileage or gas, parking, tolls and meals. Mileage will be billed at the federally approved rate.

Only the actual out-of-pocket expenses will be invoiced. The Alford Group will work closely with Vera House and make every effort to keep expenses to a minimum.

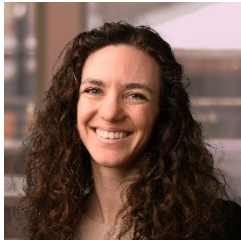
# Meet your team

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The Alford Group is pleased to present your project team for the delivery of this service. **Senior-level consultants** will work directly with Vera House's staff and volunteers. The Alford Group's **team approach** provides you with the highest level of consulting services with a continuous **hands-on service** from the project lead, **Cheryl Blanchette**.



**Cheryl Blanchette, Associate Senior Consultant** has led strategic planning efforts that tackle long-range planning and systems transformation for national organizations. She also brings extensive experience in the DEI space and will facilitate workshops and engage with the core team and other stakeholders.



**Lieve Hendren, CFRE, Consultant** brings over a decade in strategy consulting experience and volunteer engagement. She will lead the creation of the development plan and ensure that the strategic plan has appropriate, measurable goals with clear accountabilities and success milestones.



**Doug Wallack, Client Service Associate**, brings a depth of experience in communications, marketing, and development to his work. He will lead project management for our partnership, analyze data, prepare materials and assist in facilitation.

We have selected the team below for this project based on their **experience** with strategic planning, extensive knowledge of the **philanthropic** sector and experience specifically with **human services** organizations.



**Brenda B. Asare, MBA, President & CEO** will apply her experience from across the social sector to inform recommendations and strategy development. She will engage with staff and volunteer leadership.



**Mary Hackett, MA, Vice President** has a deep understanding of how fundraising operations support and elevate the work of the development office. Mary will conduct Alford Analytics and deliver data insights that will help determine your organizational strategy.

# APPENDIX

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- Team biographies
- Client lists
- About The Alford Group
- Imperative on diversity, equity & inclusion
- Service offerings
- Values and ethical practice statement



# Cheryl Blanchette

## Associate Senior Consultant



Having spent the better part of 25 years connected to philanthropy, Cheryl Blanchette has worked for philanthropic organizations as senior staff, for nonprofits as a successful grant seeker, in corporate community affairs and in work as an independent consultant. Much of Cheryl's work has focused on human service **systems transformation and addressing racial disparities across systems**. As a seasoned consultant, Cheryl has led change processes to support organizations around their DEI developmental journeys, including grounding in a shared language and analysis, facilitating difficult dialogue discussions, strategic planning, the analysis of policy and practice through a racial equity lens, awareness raising and training around implicit bias, and customized supports to support forward movement.

In addition to consulting, most recently, Cheryl functioned as the Senior Director for Systems Improvement at Casey Family Programs, a nonprofit operating foundation based in Seattle focused on improving and transforming the foster care system. At the national level, Cheryl has been an advisor to the federal Commission to Eliminate Child Abuse and Neglect Fatalities.

### Education & Certifications:

B.A. English, California State University, Sacramento  
J.D., University of California, Davis School of Law

### Relevant Experience:

A Second Chance, Inc., Casey Family Programs, Culver City Unified School District, Georgetown University Center for Juvenile Justice Reform, ICF - Capacity Building Center for States, Montgomery County Collaboration Council, National CASA Association, National League of Cities, Seneca Family of Agencies, State of Washington – Blue Ribbon Commission on Delivery of Services for Children and Families, Tides Center, Vitalyst Health Foundation

**Fun Fact:** An avid community volunteer in her personal life, Cheryl has volunteered as an adult literacy tutor and as a museum guide at the Smithsonian Museum's National Portrait Gallery.

*"Everything you can imagine is real." — Pablo Picasso*

# Brenda B. Asare

## President & CEO



Brenda Asare joined The Alford Group in 2004 and assumed the role of President & CEO in 2014. Brenda brings nearly 30 years of management and cross-sector experience and has assisted clients in raising over \$2 billion, focusing on campaign execution, strategic planning, corporate partnerships, board leadership development and organizational design.

Prior to joining The Alford Group, she was Chief Development Officer with the American Red Cross in Chicago where she led various disaster fundraising efforts raising over \$100 million.

Additionally, Brenda is 2nd Vice Chair of the Giving Institute and serves as a board member for numerous philanthropic organizations. Brenda is a frequent speaker on the intersection of diversity and philanthropy and has mentored many talented development professionals. In 2019, Brenda was recognized as Crain's Notable Minorities in Consulting for her remarkable work in the nonprofit sector.

### Education & Certifications:

MBA Marketing, Washington University in St. Louis *where she received the prestigious Dean's Service Award*  
B.S. Business, University of South Carolina

### Relevant Clients Served:

YWCA USA, Habitat for Humanity International, YWCA Evanston/Northshore, Metropolitan Family Services, Ada S. McKinley, Breakthrough, Institute for Community Empowerment, The ARK, Virginia Mennonite Retirement Community

**Fun Fact:** Brenda is a “quotes” collector. Her favorite is “My mission in life is not merely to survive, but to thrive; and to do so with some passion, some compassion, some humor and some style.” – Maya Angelou

*“What an exciting time for the social impact sector to reimagine and advance new possibilities for the greater good of the world.”*

# Lieve Hendren, CFRE

## Consultant



Lieve (LEE-va) Hendren joined The Alford Group in early 2018 and brings a decade of experience in strategy consulting and project management to her clients. She previously worked with The American Medical Association, The Rockefeller Foundation and Teach for America. Lieve also contributes to service innovation through The Alford Group's DEI taskforce.

When working with clients, Lieve implements strategic planning skills developed through bespoke projects in organizational development and thought-leadership.

Her data-driven research approach draws on experience in market segmentation, policy analysis, risk management and predictive analytics. Lieve has served at a variety of nonprofits as a staff person, volunteer and donor. She is an active adult formation leader at her church, where she co-designed and facilitated a six-week anti-racism discussion groups.

### **Education & Certifications:**

B.A. Liberal Arts, Princeton University  
Graduate coursework, Indiana University Lilly Family School of Philanthropy

### **Relevant Clients Served:**

Children First Fund: The Chicago Public Schools Foundation, Community Foundation of Greater Birmingham, Connections for Abused Women and their Children, Clean Energy Trust, Connecticut Humane Society, Inner-city Muslim Action Network, Greater Houston Community Foundation, Hartford Stage, The Night Ministry, Openlands, People's Resource Center, The Walder Foundation, YWCA Evanston/North Shore

**Fun Fact:** Some days you might find Lieve singing operas and more with the Chicago Symphony Chorus.

*“The best time to plant a tree was 20 years ago. The second-best time is now.”  
– Chinese Proverb*

# Mary Hackett, MA

## Vice President



Mary Hackett has a keen understanding of how established fundraising operations support and elevate the work of the entire development office. When data and procedures are properly structured and utilized, fundraising staff are aligned and working from a united foundation.

Mary operates Alford Analytics and Alford Diagnostics, providing deep insights into donors, trends and gaps in giving, fundraising programs and infrastructure that inform organizational decision making. She also works shoulder-to-shoulder with clients on their data migrations, builds complex campaign reports, performs database clean-up, develops processes for database management and writes customized manuals.

### **Education & Certifications:**

M.A. Organizational Leadership, Gonzaga University

B.A. Public Relations, University of Dayton

### **Relevant Clients Served:**

Chicago Foundation for Women, Tacoma Art Museum, Milwaukee Ballet, Community Foundation of Greater Birmingham, Walla Walla University, Seattle Pacific University, Annie Wright School, Bainbridge Schools Foundation, GroupHealth Foundation, Sinai Health System

**Fun Fact:** Mary and her husband (and their dogs Matt and Debra) have traveled to 34 states in their RV.

*“It’s my personal mission to make the world a better place one database at a time.”*

# Doug Wallack

## Client Service Associate



Doug Wallack brings a depth of experience in communications, marketing and development. He has previously worked with organizations including the University of Pennsylvania, Wellness in the Schools, the Good Food Institute and BoxPower.

Beyond his personal and professional involvement in the nonprofit sector, Doug has a longstanding interest in the social, cultural and human services-oriented roles that philanthropy and civil society can take on.

Doug is passionate about exploring the history of philanthropy in the United States, studying the ways private citizens have sought to fulfill their obligations to society and improve their worlds through generosity.

### **Education & Certifications:**

A.B. History, Princeton University  
COPRe Credential of Readiness: Business Analytics, Economics for Managers and Financial Accounting, Harvard Business School Online

### **Relevant Experience:**

University of Pennsylvania, Wellness in the Schools, the Good Food Institute, BoxPower, ScratchWorks, Cascadia Climate Action

**Fun Fact:** Doug likes to write, play, and record music. He believes there's no such thing as too many musical instruments.

*"A problem well put is half solved." – John Dewey*

# Select strategic planning client list

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- **A Silver Lining Foundation** (Chicago, IL)
- **After School Matters** (Chicago, IL)
- **Academy of Nutrition and Dietetics Foundation** (HQ in Chicago, IL)
- **American Planning Association** (HQ in Chicago, IL)
- **American Society for Gastrointestinal Endoscopy** (HQ in Downers Grove, IL)
- **The Arts Club of Chicago** (Chicago, IL)
- **Art Institute of Chicago Woman's Board** (Chicago, IL)
- **Better Government Association** (Chicago, IL)
- **Brain Research Foundation** (HQ in Chicago, IL)
- **Calvary Fund** (Bronx, NY)
- **Carole Robertson Center for Learning** (Chicago, IL)
- **Chicago Architecture Center** (Chicago, IL)
- **Chicago Children's Advocacy Center** (Chicago, IL)
- **Children's Home + Aid Society of Illinois** (Chicago, IL)
- **Columbia Marketing International** (Wenatchee, WA)
- **Community Foundation for Palm Beach and Martin Counties** (West Palm Beach, FL)
- **Community Health of Central Washington** (Yakima, WA)
- **Edmonds Community College** (Edmonds, WA)
- **Elawa Farm Foundation** (Lake Forest, IL)
- **Elmhurst Memorial Hospital Guild** (Elmhurst, IL)
- **Esperanza Community Services** (Chicago, IL)
- **Evergreen Treatment Services** (Seattle, WA)
- **Girl Scouts of Wisconsin Southeast** (Milwaukee, WI)
- **Homewood Science Center** (Homewood, IL)
- **Howard Brown Health** (Chicago, IL)
- **International Campaign for Tibet** (Washington D.C.)
- **Intiman Theatre** (Seattle, WA)
- **Kemper Educational & Charitable Fund** (Winnetka, IL)
- **Kenneth Young Center** (Elk Grove Village, IL)
- **Lyric Opera of Chicago Guild Board of Directors** (Chicago, IL)
- **Miami City Ballet** (Miami Beach, FL)
- **Million Dollar Round Table Foundation** (Park Ridge, IL)
- **National Palliative Care Research Center at Mount Sinai Hospital**
- **Icahn School of Medicine** (New York, NY)
- **National Asian Pacific Center on Aging** (Seattle, WA)
- **National Runaway Safeline** (Chicago, IL)
- **New Horizons** (Chicago, IL)
- **Obsidian Collection** (Chicago, IL)
- **Shoreline Community College** (Shoreline, WA)
- **SonBridge Community Center** (College Place, WA)
- **Springboard to Success** (Chicago, IL)
- **United Way of Northwest Louisiana** (Shreveport, LA)
- **Washington State Fruit Commission** (Yakima, WA)
- **Wesley International Academy** (Atlanta, GA)
- **Yakima Valley Hearing and Speech** (Yakima, WA)
- **YWCA USA** (Washington D.C.)

# Select human services client list

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- **Ada S. McKinley Community Services** (Chicago, IL) Feasibility Study, Interim Staffing
- **Arise Chicago** (Chicago, IL) Strategic Counsel
- **The ARK** (Chicago, IL) Feasibility Study, Campaign Counsel
- **Bickerdike Redevelopment Corporation** (Chicago, IL) Development Assessment, Organizational Counsel
- **Blood Bank of Alaska** (Anchorage, AK) Feasibility Study, Campaign Counsel
- **Boys Hope Girls Hope** (Bridgeton, MO) Board Training
- **Breakthrough** (Chicago, IL) Feasibility Study, Campaign Counsel
- **CALM** (CA) Campaign Planning and Preparation
- **Captain Joseph House Foundation** (Port Angeles, WA) Major Gifts Counsel
- **Carole Robertson Center for Learning** (Chicago, IL) Strategic Planning
- **Center for Enriched Living** (Deerfield, IL) Feasibility Study, Organizational Assessment, Campaign Management, Executive Search
- **Chicago Children's Advocacy Center** (Chicago, IL) Interim Staffing
- **Chicago Urban League** (Chicago, IL) Development Assessment, Ongoing Counsel, Capacity Building, Resource Development, Campaign Counsel, Annual Fund Counsel, Executive Search
- **Children's Advocacy Center of North & Northwest Cook County** (Schaumburg, IL) Alford Analytics
- **Connections for Abuse Women and their Children** (Chicago, IL) Feasibility Study
- **Esperanza Community Services** (IL) Development Assessment
- **Evergreen Treatment Services** (Seattle, WA) Resource Development
- **Erie Neighborhood House** (Chicago, IL) Campaign Planning, Campaign Counsel
- **Family Focus** (Chicago, IL) Development Assessment
- **Food Lifeline** (Western WA) Development Assessment, Interim Staffing
- **Gig Harbor FISH Food Bank** (Gig Harbor, WA) Feasibility Study, Campaign Counsel
- **Girl Scouts of Greater Chicago and Northwest Indiana** (Chicago, IL) Development Assessment, Donor Data Analytics, Corporate Impact
- **Greater Chicago Food Depository** (Chicago, IL) Grant Preparation, Campaign Counsel, Raiser's Edge Conversion, Feasibility Study, Corporate Partnership, Interim Staffing
- **Green Chimneys** (Brewster, NY) Development Assessment
- **Hearing, Speech and Deaf Center** (Seattle, WA) Database Diagnostics
- **Hope Recovery Center** (Vaughn, WA) Feasibility Study
- **IL Action for Children** (Chicago, IL) Philanthropic Market Assessment
- **Inner-City Muslim Action Network** (Chicago, IL) Board Leadership Development
- **Interfaith Community for Detained Immigrants** (Chicago, IL) Resource Development
- **Island Autism Group** (Edgartown, Massachusetts) Feasibility Study
- **Kaleidoscope** (Chicago, IL) Ongoing Organizational Counsel
- **Kenneth Young Center** (Elk Grove Village, IL) Strategic Planning
- **LifeWire** (Bellevue, WA) Feasibility Study, Campaign Counsel
- **Lutheran Child & Family Services of IL** (Oakbrook Terrace, IL) Campaign Counsel
- **McGaw YMCA** (Evanston, IL) Executive Search, Knowledge Management Solutions, Feasibility Study, Campaign Counsel
- **Metropolitan Family Services, formerly United Charities** (Chicago, IL) Feasibility Study, Campaign Planning, Branding, Campaign Counsel
- **National Runaway Switchboard** (Chicago, IL) Strategic Planning, Resource Development Planning and Implementation
- **The Night Ministry** (Chicago, IL) Program Planning, Strategic Planning, Feasibility Study, Campaign Counsel, Major Gift Solicitation Training, Executive Search
- **Orion Industries** (Auburn, WA) Development Assessment
- **Outdoors for All Foundation** (Seattle, WA) Feasibility Study

# Select human services client list

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- **Peace Community Center** (Tacoma, WA) Feasibility Study, Campaign Counsel
- **Peace for the Streets by Kids from the Streets** (Seattle, WA) Strategic Planning
- **Pioneer Human Services** (Seattle, WA) Feasibility Study
- **Ryther** (Seattle, WA) Pre-Campaign Planning Study, Campaign Counsel
- **Sanctuary Centers of Santa Barbara** (Santa Barbara, CA) Feasibility Study, Campaign Counsel
- **Shared-Use Mobility Center** (Chicago, IL) Corporate Impact
- **SkyArt** (Chicago, IL) Fundraising Counsel
- **Tacoma Community House** (Tacoma, WA) Feasibility Study, Campaign Counsel
- **Tacoma Housing Authority** (Tacoma, WA) Feasibility Study
- **Union Gospel Mission** (Seattle, WA) Feasibility Study
- **United Way Valley of the Sun** (Phoenix, AZ) Development Assessment
- **WA Youth Soccer** (Federal Way, WA) Feasibility Study, Board Development
- **YMCA of Greater Seattle** (Seattle, WA) Feasibility Study, Interim Staffing
- **YMCA of Metropolitan Chicago** (Chicago, IL) Resource Development Audit, Pre-Campaign Planning, Campaign Counsel
- **YMCA Valley of the Sun** (Phoenix, AZ) Resource Development
- **Youth Guidance** (Chicago, IL) Training
- **YWCA Evanston/North Shore** (Evanston, IL) Feasibility Study, Campaign Counsel
- **YWCA Hartford** (Hartford, CT) Feasibility Study
- **YWCA of the USA** (Washington D.C.) Executive Search, Organizational Assessment, Strategic Planning
- **Tacoma Housing Authority** (Tacoma, WA) Feasibility Study
- **Union Gospel Mission** (Seattle, WA) Feasibility Study
- **United Way Valley of the Sun** (Phoenix, AZ) Development Assessment
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# The Alford Group has been partnering with nonprofits for more than 40 years

As a national full-service consulting firm serving not-for-profits since 1979, The Alford Group has empowered more than 3,000 mission-based organizations to **grow, improve, fulfill their missions** and **change the world**.

Our mission is to strengthen the not-for-profit community.

We offer **customized solutions** in fundraising, strategic planning, assessment, governance, data analytics, interim staffing and corporate partnership strategy - based on **innovative strategies** that help organizations realize their dreams for the future.

We **empower organizations** to reimagine what it means to make a difference. We help them aim higher, reach further and dream bigger. We show them their **true potential** and the path forward to achieve it.

We have consultants in Chicago, Seattle, New York and Phoenix who have **decades of experience** in staff and volunteer roles with nonprofit organizations. Our methodology is designed to advance the mission and vision of our clients.

## We distinguish ourselves by:

Empowering staff and volunteers...

...with the knowledge and resources to take that essential step beyond planning to implementation of projects.

Offering tailored, responsive services...

...by senior professionals who understand the local and regional philanthropic landscape and are supported by the resources of a national firm.

Employing accomplished consulting staff...

...each with a passion for exploration, assessment and creativity, who have first-hand experience in the field and bring to consulting a diverse body of knowledge and understanding of the industry, its scope and challenges.

Advancing best practices in the industry...

...The Alford Group has been a consistent leader in the field of philanthropy for 40 years. Members of our team often contribute to articles, research, and courses in addition to speaking engagements and conference presentations or panel discussions.

# The Alford Group's Imperative on Diversity, Equity and Inclusion (DEI)

## The Alford Group stands for and acts in support of diversity, equity and inclusion.

We believe that mindsets, behavior and values must shift to make equity a priority and create sustainable change. While diversity offers seats at the table to a broader range of people and ideas, and inclusion ensures that all voices are heard, equity applies a historic lens to assure that everyone is welcomed and receives what they need to thrive. **Diversity, equity and inclusion must work in tandem.**

Our firm was founded 40 years ago on the principle that our human differences make the nonprofit sector stronger. We uphold this commitment by:

- Focusing on our **own organizational culture**; ensuring that our staff reflects diversity and inclusion; being adaptive as a learning organization to care, to listen, to learn and to act.
- **Challenging our clients** to improve their own diversity, equity and inclusion culture and practices to better reflect and deepen impact in the communities they serve.
- Investing in sector-wide programming centered on diversity, equity and inclusion; **encouraging the nonprofit sector** to make room for and listen to diverse voices to spark innovation; and empowering individuals and organizations to flourish.

The Alford Group has taken many deliberate steps to ensure a level playing field for all and bring an equity-forward lens to our work. Yet we are compelled to do better. **Today we seize this moment and renew our pledge to be purposeful, even disruptive, and accelerate our journey toward swift and lasting social justice.**

**Collectively, we have an opportunity to create a better world where possibilities are endless and reflect the best of who we are as humans.**



The Alford Group's president and CEO, Brenda B. Asare, was recently recognized in the **Crain's Chicago Business 2019 Notable Minorities** in Accounting, Consulting & Law. See the full list [here](#).



# The Alford Group offers customized solutions

We find that when we **uncover opportunities** for improvement outside the scope of the current project, clients want to continue their partnership with us.

Below is a sampling of the different **solutions** we offer. Every client project is customized to assist the organization in expanding its reach and **deepening its impact**.

Organizational Strategy	Fundraising	Assessments & Analytics	Governance & Leadership Development	Interim Staffing	Corporate Partnership Strategy
<ul style="list-style-type: none"> <li>• Strategic Planning and Visioning</li> <li>• Strategic Implementation Counsel</li> <li>• Mergers and Strategic Alliance Counsel</li> <li>• Program Development</li> <li>• Surveys and Benchmarking</li> <li>• Culture of Equity Assessment</li> </ul>	<ul style="list-style-type: none"> <li>• Feasibility &amp; Campaign Planning Studies</li> <li>• Campaign Planning &amp; Management</li> <li>• Development Planning</li> <li>• Major Gifts Counsel</li> <li>• Planned Giving Counsel</li> <li>• Other Philanthropic Program Planning</li> <li>• Key Messaging &amp; Case Development</li> <li>• Grantwriting &amp; Grant Strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Development Assessment</li> <li>• Governance Analysis</li> <li>• Organizational Assessment</li> <li>• Philanthropic Market Assessment</li> <li>• Staffing &amp; Infrastructure Assessment</li> <li>• Donor Data Analytics &amp; Wealth Screening</li> </ul>	<ul style="list-style-type: none"> <li>• Board Development</li> <li>• Bylaw Review</li> <li>• CEO &amp; Staff Evaluation</li> <li>• Governance Analysis</li> <li>• Board and Staff Training</li> <li>• Executive Leadership Coaching and Counsel</li> </ul>	<ul style="list-style-type: none"> <li>• Maintain day-to-day fundraising operations</li> <li>• Safeguard donor, stakeholder and partner relations</li> <li>• Provide strategic recommendations for future donor identification, engagement and stewardship</li> <li>• Onboard new hire for an organized transition and clear objectives for first 90 days</li> </ul>	<ul style="list-style-type: none"> <li>• Corporate Partnership Design</li> <li>• Corporate Giving Analysis</li> <li>• Corporate Philanthropy Program Design</li> </ul>

# The Alford Group consultants embody our values and uphold our ethical practice statements

## Values

When working with Alford consultants, you will experience and feel the values we adhere to in every step of the process.



*In addition to the ethical practice statement, The Alford Group adheres to the Codes of Ethics published by The Giving Institute, the Association of Fundraising Professionals and the Association of Healthcare Philanthropy.*

## Ethical Practice Statement

*The Alford Group will:*

1. Serve our clients loyally and focus on their best interests.
2. Protect confidential and privileged information shared with us.
3. Be honest and accurate about our own limitations and not make exaggerated claims of past achievement, nor guarantee results for clients.
4. Price our services fairly, based on the level and extent of professional services provided, and never for a contingent fee, commission or percentage of charitable income raised.
5. Represent accurately the assignment of the service team.
6. Disclose any personal or professional relationships with clients or prospects, including third party interests, strategic partner relations and leadership positions where it may be influential to the hiring of the firm.
7. Develop recommendations for our clients with qualitative and quantitative analysis to substantiate conclusions.
8. Strive to inspire our clients through their own sense of dedication and high purpose with a goal of bringing credit to their organization.
9. Be committed to diversity and treat all people with respect.
10. Accept as clients only the organizations that we believe we can best serve to honor the best interest of both parties.
11. Promote and encourage that it is in the best interest of our clients for gift solicitation to be undertaken by board members, staff and other volunteers.
12. Affirm through personal giving and/or volunteering our commitment to philanthropy and its role in society.