

Hartford Foundation Nonprofit Support Program Consultant Network Kick-Off Convening

10/03/22

Zoom Chat

Introductions:

15:05:26 From Marilyn Hoffman:

Hi from NH. We are a search firm for museums, and three of us are here today.

15:05:46 From Tracy Sopchak:

Tracy Sopchak, Principal of NextStep Nonprofit LLC. Located in Boston area. Focus on strategic planning and fundraising. nextstepnonprofit.com

15:05:47 From Priya Morganstern:

I'm the Program Director at Pro Bono Partnership. We provide pro bono legal assistance to nonprofit organizations.

15:05:55 From Anne Yurasek:

Anne Yurasek, Principal of Fio Partners - based in Chester, CT; primarily strategic planning and strategic alliances both locally and nationally.

15:06:10 From Laura Post:

Laura Post, West Hartford, consultant for Fio Partners, focused on strategic planning across a variety of NP sectors. Nice to see everyone.

15:06:15 From Ida Tomlin:

Hi. I'm Ida Tomlin, a consultant with Museum Search & Reference with office in NH. I'm working from my home in Meridian, Mississippi.

15:06:16 From Dr. William Clark:

Hi Everyone. My name is Dr. William Clark. I'm the principal of Eli Patrick & Co. (Hartford, CT). We help nonprofits simplify their fundraising processes and raise funds for their programs.

15:06:16 From Carol Buckheit:

Carol Buckheit, based in Hartford, principal of Just Giving Communications - focused on donor communications strategy, planning, writing.

15:06:28 From Randi Mccray:

Randi McCray, based on New Haven. Areas of focus: strategic planning, operations, DEIB, anti-racist practice.

15:06:28 From Julia Riseman:

Julia Riseman: From Western Mass. Consulting on Strategic Planning - and incorporating Climate Action into long-range planning.

15:06:33 From Rebecca Pardoe:

Rebecca Pardoe, www.resultshr.com, Human Resources consulting for nonprofits and small businesses, based in Simsbury, working throughout New England and beyond.

15:06:35 From Claudia Lach:

Hi all - Claudia Lach from MA OD consultant and executive coach.

15:06:36 From Gayle Gifford:

Providence based. Organization development with focus on strategy and board development.

15:06:38 From Sylvia Pu:

Sylvia Pu, joining from California. Evaluation and research focusing on adult education and workforce development.

15:06:38 From Wendy Helmkamp:

Hi everyone. I'm an OD, strategy and DEI consultant. Glad to be with you all!

15:06:40 From Diane Gedeon-Martin:

Been in business as The Write Source, LLC almost 30 years, 300 clients in 27 states, based in Glastonbury, CT. We design winning grant proposals, not just write them.

15:06:41 From Suzanne Tan:

Suzanne Tan, Museum Search & Reference, based in the SF Bay Area. Also an independent consultant with Marcum in DC.

15:06:45 From Michelle Hopson:

Greetings from Hopson Consultancy, LLC - nonprofit managed and professional service for capacity building & training! We're based in Fairfield County but work throughout the New England & TriState too.

15:06:54 From Sharon Danosky:

Sharon Danosky, Danosky & Associates, we specialize in strategy, governance, fundraising and finance.
www.danosky.com

15:06:56 From Evelyn Huynh:

Hi all. I'm Evelyn Huynh, based in Connecticut and my colleague is based in New Jersey. We are grant writers that expanded into consulting in Grantsmanship, Capacity Training, and Fundraising Strategy.

15:07:03 From Dr. Gary Damon:

Hey everyone, Dr. Gary Damon, Jr., President of Pressure Point Consulting, LLC.

15:07:05 From Sarah Glatt:

Sarah Glatt, Paper Crane Associates. We work with nonprofits at pivotal moments of change - launching, growing, and pivoting. We help them build sustainable, impactful organizations through strategic & business planning.

15:07:05 From Eric Phelps:

Eric Phelps from Rainmaker Consulting 😊 specialties include Fundraising, Board development, SP, executive coaching.

15:07:10 From Karen Senteio:

Karen Senteio, founder of Karen Senteio Consulting, Executive Coach, Leadership and Org Development consultant. www.karensenteio.com also on LI.

15:07:12 From Frank Abdale:

Hi! Frank Abdale - Hudson Valley - Strat Planning, Succession planning, board development facilitation - cofounder Nonprofit Consultants Institute.

15:07:15 From Sarah Shrewsbury:

Fundraising consultant (Vineyard Consulting) for past 8 years. Previously spent 22 yrs as a Major Gift Development Officer Yale University (13 years) Mystic Seaport, The Nature Conservancy of CT, AmeriCares (-2-3 years each).

15:07:23 From Cathy Cohen:

I am a nonprofit consultant based in Northampton MA, working largely in MA and CT, with boards, organizational development, and executive transitions.

15:07:24 From Howard Garval:

Hello, everyone! I am Howard Garval of Leaders 4 Futures LLC. My consulting practice focuses on preparing the next generation of future nonprofit leaders for senior and executive leadership positions. I have expertise in leadership training/development, board governance, executive transition, and organizational culture building.

15:07:27 From Shari Adams:

Hi. Shari Adams based in Durham, CT. My consulting work focuses on organizational planning, fund development and governance.

15:07:30 From Judy Casperson:

Judy Casperson Fio Partners LLC Chester Connecticut - Non profit business consulting/ Strategic Planning.

15:07:33 From Adam P Cohen:

My CPA firm serves not-for-profit organizations - compliance, tax, consulting and Opportune Philanthropy projects.

15:07:34 From Sara Taylor:

Hi everyone! Sara Taylor, Staff Attorney at Pro Bono Partnership. I am based in the Hartford area, but our organization provides business and transactional legal services to nonprofits located in CT, NJ and NY.

15:07:56 From Bob Serow:

Hi. Bob Serow, Principal RLS Consulting, located near New Haven, with focus on governance, strategic planning, and fund raising. Re the latter, particular focus on all phases of capital campaigns.

15:08:31 From Joelle Murchison:

Hello everyone, Joelle Murchison, Principal and Founder of EMG (also known as ExecMommyGroup). My work is in the area of diversity equity and inclusion - learning opportunities and strategic consulting. Based in East Hartford.

15:08:49 From Alicia Davis:

Alicia Davis - Partner/Executive Coach, Transformative Leadership Strategies based in West Hartford. Focused on Leadership Development, Staff Wellbeing and Board Support.

15:08:58 From P. Todd Pickens:

President of PTP & Associates of Hartford, a management consulting firm providing services to nonprofits. Areas of expertise include strategic planning, organizational development, organizational assessments, program development/launch/management, board government, development/fundraising, and DEIB issue management.

15:09:13 From Rosaida Morales-Rosario:

I'm Rosaida Morales Rosario, Rosario & Associates. I have been consulting with non-profits, foundations and small to medium sized businesses for 30 years. Primarily focused on leadership development/coaching, strategic planning and diversity, equity and inclusion work in the New England Area.

15:09:49 From Thomas Colligan:

I live in NW CT, in the areas of interim ED leadership and turnaround management, BOD Development, team building and sustainability. Most of my work has been in CT, MA with some assignments in RI, VT, NH. I have also worked with YMCAs in FL and SC.

15:10:50 From Mistinguette Smith:

Mistinguette Smith, hub of M Smith Consulting. I work with foundations and their grantees around teams managing change .

15:12:31 From Francesca Martin:

Hi everyone, I'm Francesca Martin, currently living/based in Massachusetts (many years prior living in CT); my consultancy evolved out of my NPO work in the community development spaces (e.g. affordable housing policy/development; behavioral health policies and practices, advocacy). My work currently focuses on strategic and operational planning, program assessment and design.

15:12:49 From Thomas Phillips:

TL Phillips Consulting Services, based in Manchester, has been supporting nonprofit and government organizations/associations to achieve their mission and potential for five years. Some services include building resource development strategies, collective impact collaborations, government relations, etc.

15:14:15 From Nancy Alexander:

Nancy Alexander, Lumenance Consulting LLC in New Haven. Services on the organizational development spectrum from mission, vision, and strategy to governance and team and executive coaching.

15:14:58 From Dorothy Chen-Courtin:

Hi, I'm Dorothy Chen-Courtin, I am from Massachusetts, and have worked with Hartford Foundation for several decades as a consultant My areas of focus: strategic planning, leadership transition and market research.

15:16:02 From Judith Green:

Judith Green Consulting specializing in Revenue Generation, Capital Campaigns, Strategic Visioning, Board Development and creating real impact!

15:39:44 From Abbie von Schlegell:

Abbie von Schlegell, abbievonschlegell.com focused on fundraising and nonprofit governance; women's philanthropy, coaching for development professionals.

15:45:53 From Marilyn Hoffman:

SUBJECT MATTER: arts orgs, museums

15:13:30 From P. Todd Pickens:

I wonder how many consultants participating in this session are people of color or male.

What do you hope to get out of this consultant's network?

(Themes: Connecting with other consultants; Referrals to other consultants; Nonprofit trends; Targeted OD/capacity building topics; Running a consulting business)

15:17:12 From Judith Green:

I like reconnecting with folks who I haven't seen - Howard Garval, Rosaida Rosario, etc.

15:17:31 From P. Todd Pickens:

Forming possible collaborations to partner with other consultants on projects.

15:18:01 From Diane Gedeon-Martin:

Connections to consultants that I can refer clients that need services other than what I can provide.

15:18:08 From Cynthia Rojas:

Learning about trends that others are seeing and relationship building.

15:18:28 From Melissa Harris @ Fio Partners:

Discussions about what folks are seeing in the field in various areas (strategic planning, board development, etc.), as well as discussions pertaining to the practice of consulting and running a consulting business.

15:19:12 From P. Todd Pickens:

Connecting with other consultants of color to support, encourage, and discuss our experiences working in Connecticut.

15:19:15 From Alicia Davis:

Agree with Todd Pickens and Diane Gedeon-Martin

15:19:52 From Karen Senteio:

Thought partners, possible collaborations, introduction to new products, networking , folks in the same arena.

15:19:59 From P. Todd Pickens:

Investigating and sharing thoughts on current trends in consulting for nonprofits.

15:21:52 From Eric Phelps:

Interested in expanding network. We have a team of eight, so have a full cohort to serve as sounding board. Agree that it's great to learn about folks who do what we don't (for connecting and possible referrals).

15:23:29 From Evelyn Huynh:

Frank, I would like to learn more about what you shared (looking for someone to mentor.) My e-mail evelyn@camayerconsulting.com.

15:28:53 From Thomas Phillips:

Interested in "team consulting". I currently have a few folks I use that I call my "bullpen" for larger potential client engagements. Also interested in being part of other consultant engagements using my areas of expertise.

15:29:41 From Frank Abdale:

Hi Abbie - where are you in western MA? I just moved to New Lebanon NY near Pittsfield.

15:34:42 From Alicia Davis:

I think it would be very helpful to have a list of everyone who is part of the NSP program that lists specialty areas (maybe it's available and I just don't know about).

15:36:15 From Wendy Helmkamp:

I am a cross sector consultant, and would be interested in learning about the types of changes and challenges in different sectors by consultants who specialize in these sectors. It can be hard to keep up as the world turns! By cross sector I meant cross "industry" sector - art, environment, education, etc.

15:38:59 From Alicia Davis:

Stacie Watson (business partner) and I would love to have resources about growing/scaling our coaching business (not only via partnerships and/or lead generation) ... but more about strategy/operations/systems/best practices.

15:40:14 From Cynthia Rojas:

I can't remember the choices but I believe presentations on the business side of consulting would be useful.

15:40:45 From P. Todd Pickens:

I wish consultants had a union to manage issues with nutty and or dishonest potential clients and clients, especially regarding the RFP process.

15:41:01 From Sarah Glatt:

The Freelancers Union! <https://www.freelancersunion.org/> They are out of NY but they are working on a number of pieces of legislation and best practices for freelancers.

15:46:55 From Thomas Colligan:

I find that there is a need to educate our customers, BODs and EDs. We work with numerous orgs across sectors and they don't understand similarities and differences and each one thinks they are unique.

15:47:56 From Karen Senteio

Topic: Leveling up our technical skills.

15:49:15 From Thomas Colligan:

Smaller nonprofits often don't have the resources to utilize a consultant. Most don't know the support that HFPG offers.

15:51:03 From Meher Shulman:

Priya and Sara at Pro Bono Partnership do a great deal of work with start-ups, smaller nonprofits, and nonprofits of all sizes. They are a wonderful resource, <https://www.probonopartner.org/>

15:51:13 From Gayle Gifford:

An area in which there is not very much out there at all is shared leadership. The really practical side of that .. e.g. how do co-CEOs work with boards? How do they manage staff? How do they negotiate conflict?

15:53:07 From Howard Garval:

I agree with Gayle that co-leadership, especially co-executive directors as a trend is worth learning more about and as consultants look at how we help organizations that have this leadership structure which has its challenges but also potential benefits.

15:54:06 From Meher Shulman:

Shared leadership is a great topic. Let us know if you or others you know have done work in this area and could lead a session on this topic.

15:56:12 From Marilyn Hoffman:

Julia Burns, a consultant in FL has been leading a group on the "new succession planning," including shared leadership as part of it.

15:56:55 From Marilyn Hoffman:

Julia Burns is at Julia Burns juliaburns8@outlook.com

15:58:31 From Gayle Gifford:

Meher, I'm thinking that in the performing arts there are years of co-leadership (Artistic Director/Managing Director), it might be interesting to do a roundtable or panel where consultants get to ask questions of them. Or other long time co-CEOs. They wouldn't have to prepare more than just a quick overview of their organization.

16:24:40 From Rebecca Pardoe:

Follow-on thought to the topic of co-leadership: more and more churches have shared ministry, and those co-ministers would be an audience for this programming.

15:56:56 From Anne @ Fio Partners:

There is a huge need to address the issues Francesca is raising....how do we help clients move from transactional community engagement to actual co-creation - and even better supporting community-led solution development.

15:57:02 From Thomas Phillips:

Assistance in identifying consultant opportunities and to also promote our expertise with municipalities who are trying to figure out how to spend millions of one time federal ARPA funds by 2026.

16:01:33 From Gayle Gifford:

Another area of expertise I don't bump into a lot are developing strong internship experiences and volunteer experiences.

Other Consultant Network Opportunities

15:22:39 From Gayle Gifford:

Great model is Boston Facilitators Roundtable. Deep peer learning (workshops in person and online), and forum where folks can ask for help or ideas, but the responses go directly to the asker and that individual then assembles the responses and shares all with the group. It cuts down on emails and you can look at only the ones that are of interest to you.

15:24:12 From Eric Phelps:

We have topical round tables each month to look at our hits and misses and discuss challenges we're having.

15:25:24 From Thomas Colligan:

Is the Boston Peer Learning group Gayle mentions open to all?

15:28:16 From Gayle Gifford:

Not everyone attends BFR workshops every month, only the ones that the topic interests them. I attend maybe one a year.

15:30:11 From Gayle Gifford:

@tomcolligan. Yes. Open to all. the Boston Facilitators Roundtable is a membership organization so there are dues and workshop fees discounted for members.

15:30:51 From Gayle Gifford To Everyone:

<https://www.bostonfacilitators.org/>

15:24:11 From Frank Abdale:

I am part of a couple of "practice" groups focused on strategic planning.

15:26:48 From Joelle Murchison:

There is a Community Foundation for Greater New Haven consultant group that is similar. The meetings are 2nd Fridays at 11 I believe. I have not been able to attend many but it seems like what is being described in Boston.

15:29:24 From Marilyn Hoffman:

Some of us belong to the [Alliance for Nonprofit Management](#), a national group of consultants. They have workshops and a conference coming up soon.

15:48:01 From Gayle Gifford:

One thing that the Alliance for Nonprofit Management has been deemphasizing (IMHO) is research to practice within our sector. ARNOVA is a very researcher heavy, the combination of researchers with practitioners was fabulous. It really ups the game of practitioners.

15:35:48 From Rebecca Pardoe:

Nonprofit Consultant Network: <https://nonprofitconsultantsnetwork.org/>. I agree this is a great group with hour-long weekly and monthly gatherings and a very active listerv.

15:42:49 From Diane Gedeon-Martin:

Association of Philanthropic Counsel <https://apcinc.org/>

15:50:20 From P. Todd Pickens:

The Connecticut Commission on Tourism used to run the Peer Advisor Network (PAN), which subsidized short-term consulting projects for small nonprofits with little money. The projects were for up to two days. The fee was \$600, with PAN paying \$400 and the organization \$200. It was VERY successful.

Frequency/Format of convenings

15:29:47 From P. Todd Pickens:

I believe the group meetings might be more frequent, perhaps every other month alternating between virtual and in-person.

15:32:26 From Karen Senteio:

Every other month would be good.

15:32:40 From Carol Buckheit, Just Giving Communications:

While I enjoy the convenience of virtual meetings and I am part of another consultants network, in-person always affords me the richest opportunities for interactions and information sharing. I would welcome some kind of arrangement when our meetings would allow for virtual alternating with in-person meetings. 6 meetings per year would be ideal to me.

15:35:04 From Francesca Martin:

I also think a 6x/year frequency might be a better way to start. Great next step!

15:56:51 From P. Todd Pickens:

In my experience, AFFINITY groups often end up being marginalized by mainstream efforts.

15:58:59 From Karen Senteio:

Mastermind groups can form from this group

15:59:42 From Rebecca Pardoe:

I like the idea of having multiple topics/tracks available--and also multiple formats, including virtual/in-person, whole day/half day/one hour, and an asynchronous listserv or chat group.