



2023-2027 Consultant Directory



Indiana Housing & Community Development Authority

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www.in.gov/ihcda and www.in.gov/myihcda

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2023 Consultant Directory

IHCDA Community Programs Directory of Consultants in Data/Evaluation, Executive Search, Finance, Governance/Leadership, Human Resources, and Operations.

This Directory is intended to be a resource for Indiana’s Community Action Network. At their discretion, agencies may choose these or any other consultant to fulfill their needs.

Utilizing a consultant/firm from this list does not replace the requirements in an agency’s procurement policy. This is **not** an “approved consultant” list. While these consultants/firms did go through a round of review by IHCDA to confirm they provide the services requested in our RFQ, IHCDA does not endorse the consultants/firms in this Directory.

Each full RFP response submitted by a consultant contains full descriptions of the consultant’s approach, bios/resumes of key members of the consulting team, and project examples or descriptions. To view the full RFP response from a consultant listed below, please send a request including the consultant’s name and category (governance, data/eval, or finance) to Emily Krauser at ekrauser@ihcda.in.gov.

List of Consultants by Category

The following sections contain information about regional consultants who appropriately responded to IHCDA’s RFQ for experts in the areas of Data/Evaluation, Executive Search, Finance, Governance/Leadership, Human Resources, and Operations. Please keep in mind the following descriptions of the headings below:

Subcategory: These are the services under which the consultant/firm applied to the RFQ and in which IHCDA saw sufficient evidence that they performed this type of work.

Area of Content Expertise: This is an area of subject-matter expertise that stood out to IHCDA when reviewing the consultant/firm’s submitted materials.

Service Area: All consultants/firms were asked to choose “all that apply” from a list of 5 general areas of Indiana to describe their service area.

Data/Evaluation

Services included in this category may include, but are not limited to, third party program evaluation, logic modeling, data T/TA systems, community needs assessments, and outcomes measurements.

Fourth Economy Consulting, Inc.

Rich Overmoyer

rich.overmoyer@fourtheconomy.com // (412) 251-1607

Subcategories: Third party program evaluation, logic modeling, data T/TA systems, community needs assessments, and outcomes measurements, economic impact analysis

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Fourth Economy is a mission-driven strategy group that seeks to equip change agents with the tools they need to build better communities and stronger economies. Founded in 2010 we are a team of twenty consultants with our corporate office in Pittsburgh, PA and a team located in several states. Our team combines strong quantitative skills sets and a creative engagement approach that focuses on implementation. Our experience working on hundreds of projects informs our approach and guides us on where to begin with each client engagement. We recognize that each engagement requires a tailored and iterative process. We strive to become partners with our clients and understand their needs and aspirations.

Approach: Fourth Economy is well experienced at the various approaches to the development of program evaluation and logic models. Community needs assessments and overall community analysis is over expertise which we traditionally supply for over 30 communities per year. We provide outcome dashboards and measurement tools for clients and also support impact modeling.

Transform Consulting Group, Inc.

Laura Stephens

l.stephens@transformconsultinggroup.com // (317) 324-4070

Subcategories: Third party program evaluation; logic modeling; program development; data training/technical assistance, systems, reporting; community needs assessment; outcomes measurement

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Transform Consulting Group (TCG) is an Indiana-based, woman-owned, strategic, and data-informed consulting firm focused on serving government, nonprofit, education, and communities. Founded in 2008, TCG brings a unique combination of knowledge, expertise, and relevant experience to this pool of nonprofit capacity building consultants. Our team has extensive experience as former nonprofit staff. In our current capacity building work, many of our nonprofit clients access government funding to support their programs and services. We have worked with Community Action Agencies (CAAs) and other similar organizations whose missions include promoting family self-sufficiency and alleviating poverty.

Approach: TCG follows a participatory approach to client engagement. We believe that gathering and understanding data is critical before addressing any problem or

recommending any solution. We diligently uncover and identify appropriate research to inform our recommendations.

IU Center for Research on Inclusion and Social Policy

Roxy Lawrence

rlawren@iu.edu // (317) 278-1328

Subcategories: Program evaluation (process evaluation, implementation evaluation, outcome evaluation, and impact evaluation), Evaluation and data capacity building
Survey research, Qualitative data collection and analysis, Quantitative data collection and analysis, Exploratory research

Service Areas: Central IN

Biography: The IU Center for Research on Inclusion and Social Policy (CRISP) is part of the Indiana University Public Policy Institute (PPI) at the Indiana University O’Neill School of Public and Environmental Affairs on the IUPUI campus. CRISP evaluates, analyzes, and disseminates community-relevant research about social disparities and complex policy issues to help leaders and residents make informed decisions. CRISP knows solving systemic issues like poverty, income and educational disparities, incarceration, housing, and employment is nearly impossible without considering the role of race, ethnicity, and other demographic factors. CRISP recognizes its research cannot and should not inform decision making without the input of diverse stakeholder groups, including community residents and leaders. As such, CRISP’s research is intentionally policy-driven, collaborative, equity-minded, and community-driven to help Indiana organizations and leaders make informed decisions.

Approach: At CRISP, we view our data/evaluation process with our partners as an opportunity for learning and a point to leverage, strengthen, and sustain their work. As such, we prioritize the learning and accountability needs of our partners by producing evaluations that are relevant and useful for their development planning and management processes. Our approach is collaborative and customized to meet the unique data and evaluation needs of our partners. When possible, we involve relevant stakeholders actively and early on in the evaluation process to reinforce stakeholder ownership and buy-in. We also use an asset-based perspective. This involves nurturing the data and evaluation strengths and resources of our partners and leveraging existing systems to strengthen their work.

Limelight Analytics

Mindy Hightower King

mindy@limelightanalytics.com // (812) 325-0317

Subcategories: Evaluation planning, outcome measurement, formative evaluation, data collection, performance measurement, data tool design (e.g., surveys and interview protocols), data management and analysis, data visualization, and evaluation capacity-building through technical assistance and coaching

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Limelight Analytics LLC partners with foundations, schools, universities, state agencies, and non-profit organizations to meet their measurement, data, and strategic needs. We have more than 20 years of experience assessing the implementation and impact of local,

state, and national programs in education, public health, workforce development, social services, and youth development.

Approach: Limelight Analytics LLC maintains a client-focused approach throughout each of our consulting projects. We work to develop an understanding of our client's personal and organizational needs, build trust through our interactions, and commit to shared goals. We encourage our clients to reflect on their own actions and processes, and to determine how they might be improved. We provide positive feedback and offer alternative approaches when needed.

Thrive Nonprofit Solutions

Kate Bathon Shufeldt

thrivenonprofitsolutions@gmail.com // (317) 653-5757

Subcategories: Evaluation and assessment designs for quantitative and qualitative methods, Logic modeling, Outcome measurement, Survey construction, Secondary data synthesizing, Community needs assessment, Program evaluation through a variety of approaches, such as Developmental and Participatory evaluation, Focus groups, Program observations, Continuous Quality Improvement, Data compilation for grant reporting

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Kate Bathon Shufeldt, MSW, MPA is the founder and principal consultant of Thrive Nonprofit Solutions. She began Thrive in 2016 after working in nonprofit, for-profit, and governmental agencies in Indiana, Missouri, Michigan, and Arkansas. She started Thrive to help organizations improve the vital services being utilized by those most in need. We pull from over 12 years of experience in program planning and evaluating nonprofit and government services of all sizes and focus areas. Thrive has developed and implemented evaluation plans utilizing a combination of quantitative and qualitative methods, including surveys, focus groups, program data, program observations, and secondary data such as Census Bureau surveys. Past evaluation and assessment clients include K-12 school districts, community centers, community foundations, and youth-serving nonprofits.

Approach: Thrive approaches each program planning and evaluation project by assessing the client's needs and meeting them where they are. We value open communication and are honest and straightforward with our clients regarding expectations and responsibilities. While we develop an initial scope of work, Thrive also understands the need for flexibility should anything derail program implementation or data collection.

Thomas P. Miller & Associates

Wendy Brewer

wbrewer@tpma-inc.com // (740) 350-5880

Subcategories: Qualitative Evaluation: (Implementation // Developmental // Fidelity // Continuous Improvement); Data Collection Tool Design: (Data Tracking Strategies // Rubric Design // Intake Forms // Pre- & Post-Tests); Community Based Research: (Community Needs Assessments // Asset Mapping // Special Population Studies // Service Gap Analysis); Quantitative Evaluation: (Outputs // Outcomes // Impact Analyses // Quasi-Experimental Designs // Experimental Designs // Cost Analyses); Survey Design & Analysis: (Distribution Management // Outreach & Marketing // Customer & Employee Satisfaction // Service & Program Assessment // Market Research); Evaluation & Data Collection Technical

Assistance: (Virtual & In-Person Training Series // One-on-One Coaching); Evaluation Planning: (Logic Modeling // Theory of Change // Evaluation Design & Methodology // Research Question Identification // Stakeholder Engagement)

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Since 1989, TPMA has provided consulting services across the United States and internationally, working with local and state governments, economic and workforce development agencies, industry associations, non-profit organizations, and educational institutions. TPMA envisions a world that thinks strategically, works collaboratively, and acts sustainably. To that end, we employ our mission of empowering organizations and communities to reach their goals through strategic planning and partnerships that create positive, sustainable change. TPMA provides expertise in assessing markets, performing evaluations, preparing needs assessments, conducting stakeholder engagement and outreach campaigns, and organizing social and economic resources to implement community and economic development strategies. Our team produces customized research and analysis and understands how to structure evaluation, technical assistance, and strategic interventions to be a leveraged resource for continuous improvement.

Approach: TPMA approaches every evaluation as a partner and strives to increase your organization's internal capacity so that you can continue high-quality data collection that supports continuous program improvement. Our team will design a rigorous mixed methods evaluation, utilizing qualitative data to substantiate and contextualize quantitative data, but what sets our team apart is the ability to translate data into useful information for you and your program partners. We pride ourselves on the ability to convey sophisticated evaluation in a straightforward, easy to understand way that satisfies funding requirements while supporting program growth and sustainability.

Wells Strategy + Solutions LLC

Stephanie Wells

stephanie@wells-strategies.com // (317) 506-7921

Subcategories: General research and analysis, including issue briefs and original research. Labor market gap analysis, Housing gap analysis, Occupational forecasting, Economic and workforce development environmental scans (situational analysis), Program evaluation, Data visualizations (Tableau)

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Wells Strategy + Solutions is a WBE in the State of Indiana and the City of Indianapolis that was founded in 2019 by Stephanie Wells. Wells Strategy + Solutions provides program technical assistance, planning, policy development, partnership development, research and data analysis, and grant development for governments, nonprofits, associations, and institutions of higher education. Prior to founding Wells Strategy + Solutions in 2019, Stephanie Wells was the Vice President of Workforce Development for the Indiana Manufacturers Association. Previously, Stephanie worked as a Senior Fiscal Analyst for the Indiana Legislative Services Agency. She served in various roles at the Indiana Housing and Community Development Authority, the Indiana Economic Development Corporation, the Office of Governor Mitch Daniels, Ice Miller, and the Indiana University Public Policy Institute.

Approach: Wells Strategy + Solutions provides similar work for other clients, using a variety of vetted researchers and data experts. The organization is considering hiring a full-time research associate, if client demand necessitates it.

Executive Search

Services included in this category may include, but are not limited to, retained search, identification, and recruitment of key leaders, executive assessment and leadership retention, and transition services.

Don Gulbrandsen

Don Gulbrandsen

don@empowernonprofit.com // (641) 373-3375

Subcategories: Full-service nonprofit executive search and hiring, including succession planning; organizational and position assessment; recruiting; candidate screening; interview and logistical support; background and reference checks; decision facilitation; hiring and onboarding support

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Don Gulbrandsen is the President of Empower Nonprofit Consulting. Following a career in publishing, he earned a Master of Nonprofit Administration degree from North Park University and switched sectors. He served in leadership roles with social service agencies in Illinois, Oregon, and Indiana then began consulting full-time in 2017. His practice focuses on executive search, strategic planning, board development, and human resources. As an executive search consultant, he has successfully guided more than 20 nonprofits through leadership transition. Recruiting and developing top talent has been a focus throughout his career. Even though he has worked with thousands of candidates and conducted hundreds of interviews, Don still gets excited matching a passionate candidate with an opportunity that is a great fit for their skillset.

Approach: I take a hands-on and interactive approach to executive search that is matched to each organization's individual needs and aspirations. Candidate fit, determined by first identifying key hiring factors, drives my search and review process and helps facilitate board decision-making. Because I carry the load logistically—from scheduling interviews to managing background and reference checks—boards can expect a timely and largely stress-free hiring process.

Charitable Advisors LLC

Bryan Orander

bryan@charitableadvisors.com // (317) 752-7153

Subcategories: Executive search for the ED/CEO roles

Service Areas: Central IN, Northeast IN, Southeast IN

Biography: Charitable Advisors was founded by Bryan Orander in 2001 to provide strategic planning and board development consulting to nonprofits in central Indiana. Charitable Advisors began publishing an e-mail newsletter (Not-for-profit News) to connect the nonprofit community that, twenty years later, has 13,000 weekly subscribers and has

become the jobs marketplace for nonprofits across Indiana. In the late 2000s, Charitable Advisors began a move away from planning and board development services to supporting nonprofits in succession planning and executive search for CEO/ED positions. The Charitable Advisors team has completed more than 100 successful ED/CEO searches with well over 90% of hires remaining in their roles two years after the hire.

Approach: We are not a "staffing firm" that merely shoots potential candidates at the board. 1) Our projects often start 1-2 years prior to a CEO/ED retirement so we can help board leadership and the departing CEO/ED prepare for the big transition. We then shift from preparation support to actively leading the search where we walk alongside the Search Committee, planning meetings, actively recruiting candidates, scheduling interviews, debriefing, and allowing committee members to focus on choosing the next leader while we handle the promotion, screening, and admin. 2) If the CEO/ED opening is due to dismissal or natural turnover, we assist the Executive Committee in getting organized, forming a search committee, and gathering input from staff and board, before launching into the search process.

Finance

Services included in this category may include, but are not limited to, compliance with 2 CFR 200, policy and procedure documentation, presentation of finances to nonprofit boards, accounting for blended funding streams, and fund accounting.

SAB Consulting, LLC

Stephanie Burdick

sabconsultingllc@gmail.com // (502) 439-8383

Subcategories: Compliance with 2 CFR 200 and policy and procedure documentation

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Stephanie A. Burdick is the owner and sole member of SAB Consulting Services, LLC d/b/a SAB Consulting, LLC. I specialize in providing technical assistance on HUD HOME and CDBG regulations, rental housing underwriting, asset management and loan management services, and analysis and preparation of policies and procedures relating to the community development and affordable housing fields. I pride myself on quality customer service and commitment to working alongside my clients to deliver the best possible product.

Approach: My approach to providing consulting services is to first understand the grant award and programmatic support from IHCD's perspective and understanding the expectations IHCD places upon their subgrantees. Based upon this information, I can develop individualized training sessions for staff that would not only provide an overview of what the federal regulations are, but what that means for staff in their everyday job duties. I find it extremely beneficial for staff to understand the federal regulations within the framework of the grant award and thus State level regulations, and how those regulations are applied at an organizational level.

MCM CPAs & Advisors LLP

Debbie Smith

debbie.smith@mcmcpa.com // (859) 514-7773

Subcategories: Compliance with 2 CFR 200, policy and procedure documentation, presentation of finances to nonprofit boards, and fund accounting

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: MCM CPAs & Advisors is a large regional CPA and advisory firm with offices throughout Kentucky, Indiana and Ohio. We have approximately 400 employees. We perform assurance and tax services for a wide range of industries and provide advisory services in information technology, human resources, risk advisory, data analytics and business transactions. One particular industry of emphasis for MCM is nonprofit entities in which we have over 350 clients.

Approach: MCM approaches capacity building at both the individual and the organizational levels. On an individual level, MCM focuses on providing appropriate training to expand knowledge and skills within the individual's level of expertise. Additionally, we actively work to ensure that team members are assigned to engagements that allow them to expand experience in areas of expertise. At the organizational level we actively recruit and retain team members with relevant knowledge and expertise and encourage those team members to share knowledge with employees in their sphere of influence. Additionally, MCM continuously invests in new IT capacity to streamline our processes in an effort to free our team members for projects that require critical thinking and relationship building.

Governance/Leadership

Services included in this category may include, but are not limited to, strategic planning, nonprofit executive coaching, board governance and engagement, and board/leadership training.

Radiancy Coaching Partners, Inc. d/b/a Stefanie Krievins & Co.

Stefanie Krievins

stefanie@stefaniekrievins.com // (317) 506-9668

Subcategories: Executive Coaching, Team building, Training on communications, trust, accountability, conflict, customer service, and other "soft" skills upon request, Board governance, Strategic planning and execution, Change management, Leadership development

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Stefanie Krievins & Co. provides change management and leadership development training and coaching to nonprofits and small businesses who want to make a difference, create a culture where people want to work, and serve their customers with joy and innovation. They have a team of diverse, experienced coaches from a wide variety of industries and roles: IT, supply chain management, nonprofits, consulting, startups, and the executive boardroom. Their development programs focus on executive coaching, team

dynamics and trust building, change management, succession planning, strategic planning, and leadership development.

Approach: We view capacity building as being able to build skills at the individual level so the team performs better which allows the organization to perform better. Specifically Community Action leaders need practical tools to engage and motivate their employees to address the many ways their communities are evolving. Often times one-off trainings aren't enough to equip staff with new skills. Our approach is to deliver a series of trainings, so your agency sees the most impact and return on investment. We use a 5-step process to deliver every learning opportunity so that we combine learning best practices with the outcomes each agency needs to see for that project.

Fourth Economy Consulting, Inc

Rich Overmoyer

rich.overmoyer@fourtheconomy.com // (412) 251-1607

Subcategories: Strategic planning, Nonprofit executive coaching, Board governance and engagement, Board/leadership training, Diversity, equity & inclusion, Consultation

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Fourth Economy is a mission-driven strategy group that seeks to equip change agents with the tools they need to build better communities and stronger economies. Founded in 2010 we are a team of twenty consultants with our corporate office in Pittsburgh, PA and a team located in several states. Our team combines strong quantitative skills sets and a creative engagement approach that focuses on implementation. Our experience working on hundreds of projects informs our approach and guides us on where to begin with each client engagement. We recognize that each engagement requires a tailored and iterative process. We strive to become partners with our clients and understand their needs and aspirations.

Approach: Fourth Economy works with organizations in the development of strategic plans, executive coaching, board engagement and program/ initiative development. Our approach utilizes a set of tools that are guided by human-centered design principles. Our expertise is in working with organizations that are working to ensure they are meeting constituent needs and/or responding to changing market dynamics. We have worked with both start up organizations and legacy providers.

Transform Consulting, Inc.

Laura Stephens

lstephens@transformconsultinggroup.com // (317) 324-4070

Subcategories: Strategic planning; board governance & engagement; fundraising strategy / planning; agency policies / procedures (SOPs)

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Transform Consulting Group (TCG) is an Indiana-based, woman-owned, strategic, and data-informed consulting firm focused on serving government, nonprofit, education, and communities. Founded in 2008, TCG brings a unique combination of knowledge, expertise, and relevant experience to this pool of nonprofit capacity building consultants. Our team has extensive experience as former nonprofit staff. In our current

capacity building work, many of our nonprofit clients access government funding to support their programs and services. We have worked with Community Action Agencies (CAAs) and other similar organizations whose missions include promoting family self-sufficiency and alleviating poverty.

Approach: TCG follows a participatory approach to client engagement. We collaborate with our clients—working with them, not simply for them. We assess each situation by gathering research and data in order to identify gaps and opportunities for our clients. We facilitate consensus by soliciting feedback from key stakeholders. We create meaningful recommendations and reports to enable our clients to accelerate their impact.

Robert E. Hoke

Robert Hoke

info@roberthoke.com // (317) 356-6367

Subcategories: Strategic and Program Planning including process design; strategic planning committee support; stakeholder input through surveys, focus groups, and key informant surveys; mission, values, goals, and objective development; evaluation measures

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Robert E. Hoke is an Indianapolis-based consultant who has been providing evaluation, community research and planning, statistical analysis, and grant management services to nonprofit and government organizations since 1997. Robert was first involved in strategic planning as an employee of the United Way of Central Indiana in the 1990's. Since then, Robert has provided strategic planning services to community organizations, libraries, state-wide membership organizations, and other non-profits. Robert has a B.A. from Hope College (Holland, Michigan) with a composite major of political science, sociology, economics, and a Master of Public Affairs from Indiana University School of Public and Environmental Affairs. In 2022, Robert received a lifetime achievement award from the Indiana Evaluation Association.

Approach: Robert's approach to tailoring the strategic planning approach is based on the organization's history with strategic planning, the level of satisfaction with the current goals and objectives, and the perceived volatility of forces driving the organization's success. The approach may be a traditional Strength, Weaknesses, Opportunity and Threats (SWOT) Analysis or a visioning process that identifies Strengths, Opportunities, Aspirations, and Results (SOAR).

Partec Consulting Firm

Alyson Small

alysondp@partecgroup.com // (708) 935-8796

Subcategories: Strategic planning and board governance and engagement

Service Areas: Central IN

Biography: Partec Consulting Group, Inc. (Partec) was established in 1994 as a full-service consulting and training firm based in Indianapolis, Indiana. Our consulting team brings the necessary education and work experiences to help clients address operational, programmatic or organizational challenges and opportunities. Skilled in designing and implementing result-oriented interventions, Partec provides strategic solutions and tangible results through one-on-one consultation, coaching, group facilitation, and training. Over the

past 25+ years, Partec has worked with numerous nonprofits, foundations, universities across the country covering different sectors including human services, housing and community development, education, youth development and public safety.

Approach: Partec understands effective capacity-building programs must be flexible, highly participatory, and support the organization's leadership to drive change. Partec's service delivery methodology engages clients, starting with an onboarding session to determine desired outcomes. Partec then works with each client to initiate an individualized informational gathering phase to help understand where the organization stands and desired growth plans. For strategic planning engagement, Partec works with the client to determine the most appropriate planning model and engagement tools. Partec uses its assessment tools for board governance and incorporates the results into board training or coaching.

Thomas P. Miller & Associates

Wendy Brewer

wbrewer@tpma-inc.com // (740) 350-5880

Subcategories: Strategic Planning; Board Governance & Engagement

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Since 1989, TPMA has provided consulting services across the United States and internationally, working with local and state governments, economic and workforce development agencies, industry associations, non-profit organizations, and educational institutions. TPMA envisions a world that thinks strategically, works collaboratively, and acts sustainably. To that end, we employ our mission of empowering organizations and communities to reach their goals through strategic planning and partnerships that create positive, sustainable change. TPMA provides expertise in assessing markets, performing evaluations, preparing needs assessments, conducting stakeholder engagement and outreach campaigns, and organizing social and economic resources to implement community and economic development strategies. Our team produces customized research and analysis and understands how to structure evaluation, technical assistance, and strategic interventions to be a leveraged resource for continuous improvement.

Approach: TPMA has built a nationally recognized business based on innovative strategy and technical improvements to community, workforce, and economic development initiatives, public policy, higher education programs, and nonprofit organization operations. We have helped hundreds of clients strengthen their relationships with partners to enhance the effectiveness of their service delivery. TPMA aligns people, opportunities, and initiatives to enhance the overall value of communities, the impact of educational institutions, and the sustainable growth of organizations.

Hedges

Jodi Snell

jodi@hellohedges.com // (317) 935-9200

Subcategories: Strategic Planning, Board Governance and Engagement, Board/Leadership Training

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Hedges was founded in 2002 to help Indiana nonprofit organizations, and the philanthropic sector, become more strategic, more effective, and more sustainable through our comprehensive line of capacity building services. From identifying and cultivating strong philanthropic partnerships to facilitating impact-driven community assessment and strategic planning processes for both individual organizations and community-wide initiatives, Hedges has supported and strengthened more than 150 Indiana nonprofit organizations, corporations, and foundations during our 21-year history. By focusing our work in Indiana for the last 21 years, the Hedges team has developed not only a deep local knowledge, but also a passion for the people, the philanthropic organizations, and the partners who call our community home.

Approach: Hedges approaches capacity building by looking holistically at an organization. When working with organization, we consider the Four Pillars of Organizational Health including Programs and Impact, Leadership and Culture, Finance and Development, and Marketing and Communications. Hedges prioritizes this holistic approach to support organizations in examining how effectively their vision, mission, and values are showing up throughout all aspects of the way they are structured and the way they do their work.

Chris Handberg Consulting

Chris Handberg

christopherhandberg@gmail.com // (317) 437-0785

Subcategories: Strategic Planning, Board governance, development, & engagement, Nonprofit executive coaching, Board leadership training, Fundraising strategic planning, Volunteer recruitment, development, and engagement, Governance policies & procedures development (bylaw review, board/staff handbook development, fiscal policies, etc.)

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: I am a seasoned nonprofit professional with 20+ years of experience in outreach advocacy, program and research direction, and executive leadership. I have a broad skill set that allows me to improve operations, allocate resources, administer climate assessments, and facilitate strategic planning. As the inaugural Executive Director of Indy Pride, I was committed to building relationships with nonprofits, corporate partners, elected officials, and community leaders to ensure the organization represented the people it served. As Program Director at the Domestic Violence Network, I developed curriculum, strategies, and partnerships to advocate for the prevention of domestic violence, dating abuse, and sexual assault. I have also taught at Carmel High School and hold a Master of Education degree from Indiana Wesleyan University.

Approach: My approach to capacity building in nonprofit governance and leadership is rooted in relational leadership. By listening to the perspectives of those in leadership positions, assessing the community's perception of the organization, and understanding the mission, values, and goals of the organization's leaders, I work to build a foundation for growth and sustainability. With this approach, I also use an initial assessment tool to determine an organization's health and priority areas for growth.

Christopher Walsh

Christopher Walsh

ckirkwalsh@gmail.com // (317) 445-8002

Subcategories: Strategic planning, nonprofit executive coaching, board governance and engagement, and board/leadership training

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Chris Walsh brings over a decade of leadership across all levels of government. He served as the Chief Operating Officer for IHA, an \$87 million dollar per year organization, overseeing all aspects of its mission to provide housing and rental assistance to over 10,000 low-income households in Indianapolis. He led the United States Department of Housing and Urban Development's Strategic Planning, Performance Data, and Grants Management teams. He co-authored the President's Management Agenda while on assignment with the Executive Office of the President of the United States. Chris has served as executive leader to teams as large as 70 professional staff; directly oversee vice president level employees, setting strategic direction and driving performance for public and private sector organizations.

Approach: Capacity building in governance and leadership should be focused on providing sustainable tools which can be replicated for years to come. This starts with active listening to understand the unique circumstances of each stakeholder, and it results in education and hands-on demonstrations of the tools along with step-by-step guides and tangible documentation of the practical steps to repeat planning and engagement efforts in the future.

Kristi Howard Shultz Consulting

Kristi Howard-Shultz

kristi@khsconsulting.org // (317) 670-4644

Subcategories: Board development, capacity building, fundraising sustainability

Service Areas: Central IN, Southeast IN, Southwest IN

Biography: Kristi Howard-Shultz Consulting (KHS Consulting) is a central Indiana nonprofit management firm specializing in fundraising, board development, and capacity building services. Since 2018, we've worked with clients to elevate their brands, grow the engagement, and build sustainable fundraising practices. We blend data driven decisions with our years of experience to build strategies that are right sized for our clients and evolve as they grow.

Approach: As a consultant, Kristi has the unique ability to meet organizations where they are. She can marry best practices with the reality of where the organization is in its current state. She can take a client's vision and work with the board and staff to operationalize practices to achieve their vision. She is enthusiastic, authentic, and intentional. She is committed to the success of her clients. Once your work together is finished, you will have a plan, in place, in action, not just a beautiful binder on your shelf. You will have a relationship, an ally, and a resource for the future.

WiseCAP Training & Consulting

Tai Blythe

tblythe@pacecaa.org // (812) 882-7927

Subcategories: Governance, Shared governance between Community Action Boards and Head Start Policy Council, Leadership and teambuilding, New executive leadership, Leadership transition, Re-engineering an agency

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: WiseCAP Training & Consulting provides professional development opportunities for non-profit entities, including Community Action Agencies and Head Start Programs. We have provided training in over 90 cities over the last 13 years. Because we operate a Community Action Agency, we understand the complexities of agency operations. Our examples are relevant, and we often hear- “did someone tell you about our agency before you got here?” Our firm will work closely with your agency leadership to develop a tailored plan for all staff training, leadership training & retreats, personality assessments, or keynotes.

Approach: The trainers work together to create a personalized presentation that invites interest, thought, and engagement. Trainers are not only experts in their field but consider and incorporate adult learning principles. We use a combination of visual training materials such as PowerPoint presentations, discussion topics, verbal presentations, and role playing. Sessions are relevant, entertaining, and contain information that can be adopted into practice. Trainers have the capacity to provide both in-person and virtual training.

Human Resources

Services included in this category may include, but are not limited to, development of human resource models, HR policies and procedures, recruiting and training new employees, and resolution of issues pertaining to HR.

Quad Solutions, LLC

Alicia Sims

asims@quadsolutionsllc.com // (317) 625-7132

Subcategories: Development of human resource models, HR policies and procedures, recruiting and training new employees, and resolution of issues pertaining to HR, payroll services, onboarding and off boarding, strategic planning, individual and group coaching and governance and leadership

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Quad Solutions, LLC is a multi-faceted company that provides business services in the areas of Administration, Resource Development, Marketing and Multimedia and Professional Development. We are passionate and eager to work with companies and organizations that provide programs to underprivileged and underserved communities. We use a collaborative system of subcontracted individuals and entities to provide excellent, professional, and efficient service. Each project is guaranteed to have a dedicated Project Manager, who oversees the team and ensures the scope of work is completed. The dedicated team for this proposal has over 10 years of experience reading and interpreting federal government policy, multiple degrees in relevant fields, knowledge, and skill in developing policy and procedures and previous work with community action agencies.

Approach: Our approach of capacity building is to begin with a consultation between a dedicated Project Manager and the Client that identifies the need and expectations. Through a series of discovery and discussion we will determine the scope of services, objectives and deliverables needed. This information will be relayed to the team and a final proposal including cost and timeline will be developed. The Project Manager will communicate and

establish final agreements, determine benchmarks and auditing procedures, address challenges, questions, and concerns. The team will begin and complete services, with the Project Manager supervising and communicating with the Client. Upon mutual satisfaction of completion, the Project Manager and Client will close out the project and submit reports.

Purple Ink, LLC

Stacey Anouan

staceya@purpleinkllc.com // (317) 501-5844

Subcategories: HR consulting, outsourcing, recruiting, training, career coaching, leadership coaching, and speaking services

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Founded in 2010, Purple Ink LLC is a provider of customized HR Services focused on making a JoyPowered® workplace a reality. Purple Ink LLC serves numerous clients in the midwest offering HR consulting, outsourcing, recruiting, training, career coaching, leadership coaching, and speaking services. Their mission is to inspire JoyPowered® work, and they help organizations and employees put processes and procedures in place that are focused around creating a positive culture and a joyful workplace.

Approach:

Operations

Services included in this category may include, but are not limited to, risk assessment, information and technology support, company security and cybersecurity, and agency policies and procedures (SOPs). Additionally, fundraising and development would fall into this category—however, we are specifically only seeking specialized support pertaining only to developing unrestricted/match/earned income funds.

Campbell and Associates, LLC

Christiaan Campbell

crc@realizedrevitalized.com // (317) 370-4614

Subcategories: For operations consulting, C&A can approach with specific targets in mind, such as the development of Key performance indicators, strategic planning, risk assessment, growth and partnership plans, reorganization, or specific business problems. If there is no specific goal, but there is a need to improve efficiency, outcome management, or policy and procedure, C&A can review operations, procedures, outcomes, and systems and make recommendations for improvements based upon best practices. Coaching and mentoring is available for employees that require that service or for teams that need assistance navigating through change. Short term executive leadership and retained services are also available.

Service Areas: Central IN, Northeast IN, Northwest IN, Southeast IN, Southwest IN

Biography: Campbell & Associates is a consulting firm established in 2018 with a mission to work with human service companies differently. Based upon decades of executive experience in nonprofit and for-profit organizations, the partners approach projects

transparently, working with clients to meet their needs on their budget and in the manner that fits their culture. This means not only providing the solution, but also mentoring, coaching, and supplying the tools and resources necessary for the client to understand why a problem came about and how C&A went about analyzing, addressing, and resolving it. Christiaan Campbell has held senior leadership positions in healthcare and human services for over 25 years, primarily in Intellectual and Developmental Disabilities and Employment Services. Ari Campbell is an active nonprofit COO.

Approach: We prefer a casual approach where employees feel relaxed and their opinion is valued. All of our rates and processes are transparent and posted publicly on our website. Each project begins with a detailed discovery process to ensure a mutual understanding of what help is needed and what constraints (financial or otherwise) must be considered. All clients are provided with a Notion webpage that gives them real-time access to all materials, tools, and information, including what they are being charged and why. Detailed timelines and actionable items are also listed to ensure that everyone is aware of what is occurring, and the client remains in complete control of the process. Several scheduled updates and "trigger points" are used to make course corrections whenever necessary.