



BETTER TOGETHER FUND TECHNICAL ASSISTANCE RFQ

The Better Together Fund (BTF) has released a Technical Assistance RFQ for providers of technical assistance in various areas related to strategic partnerships. This is the response of the applicant below:

What is the legal name of the consulting firm or independent consultant?	A.F. Snow & Co. dba Track15
Please provide the legal structure of the firm.	LLC
What year was the firm founded? (if applicable)	A.F. Snow & Co. was created as an umbrella LLC in 2015. Track15 was formed in 2017.
How many individuals work in the firm?	10
Please provide the names and title of key individuals in the firm who would potentially be working as part of this RFQ.	Andrew Snow - Co-Founder and Managing Partner Chris Shultz - Managing Partner Hannah Lundeen - Major Donor Relations Julie Griffith - Major Donor Relations Joel Rothermel - Data and Strategy Katie Kelton - Storyteller Martina Fundaro - Event Planning Miya King - Grant Writing Jason Wright - Grant Writing Kendyl Wear - Direct Response
Please provide the consultant's or firm's website.	https://www.track15.com/
For an independent consultant. How long has the applicant been working as a consultant? (if applicable)	
Please provide a list of languages spoken by staff.	English, Spanish, Korean, Czech

PRIMARY CONTACT INFORMATION	
Name	Hannah Lundeen
Address	1300 S Polk Street,
City/Town	Dallas
State/Province	TX
Zip/Postal Code	75224
Country	United States
Email Address	hannah@track15.com
Phone Number	608-807-7620

<p>Please describe the geographic area served by the firm.</p>	<p>We serve nonprofits in the DFW area.</p>
<p>What are your firm’s primary areas of practice?</p>	<p>Track15 envisions a world where nonprofit leaders can focus all their time on achieving the mission of their organization. We build trust and excitement by offloading the daily tasks associated with the advancement and stewardship of an organization’s donor base. Data and CRM Management: Track15 integrates with our clients’ CRM; using data to manage major donor relations, execute annual giving strategies, and host events to feed a functional pipeline. We also have a certified Salesforce Administrator on our team to build a customized Client Relations Management system. Storytelling: Our Strategy Team works with key stakeholders to tease out the “why, what, how, and who” of the organization to create the right narrative that both inspires support and keeps operations on track. Major Donor Relations: Our Development Specialists and Grant Writing Team support the relationships between the organization’s Executive Director and the individuals, foundations, and corporations who support it. This support resembles a Development Director focused on securing major gifts by incorporating a customized engagement strategy for each potential donor. It also includes grant writing and reporting, as well as prospecting for potential supporters with a similar affinity. Creative Annual Giving Campaigns: From creative to execution, we integrate social media, email, direct mail, and peer-to-peer strategies to engage the constituent base in short-term, goal-oriented, thematic campaigns. We keep clients informed through a variety of metrics that demonstrate supporter engagement, and we make improvements based on that</p>

	<p>data. Fundraising Event Design and Management: Led by a Certified Meeting Professional, we effectively inspire event guests to donate by tying every element of the event design with the organization’s mission. Events also act as a cultivation point for current supporters and are the entry point for new donors.</p>
<p>How many Better Together Fund projects that were awarded funding have you been involved with?</p>	<p>N/A</p>
<p>Please list all Better Together Fund projects that were awarded funding that you have been involved with. You can list a project as anonymous if it is confidential.</p>	<p>N/A</p>
<p>Briefly describe 1-3 examples of restructuring negotiations with which you have been involved; and/or examples of projects where you have helped facilitate, explore, or implement a formal collaboration as defined by the Better Together Fund.</p>	<p>At the beginning of each client engagement, we work with board members, donors, executive staff, and key staff to build a compelling case statement outlining the organization’s ethos, operations, and outcomes. This exercise typically uncovers misalignment between strategy, operations, and messaging. These challenge areas can create operational issues that bring the organization’s intended outcomes into question in a donor’s eyes and must be addressed internally. While we do not directly sell strategic planning, this work organically allows us to assist in realignment. We use a current state/future state framework to generate a “Message Map” that reflects the common ground from which all stakeholders can work from.</p>
<p>How would you describe the range of diversity reflected in your firm?</p>	<p>Everyone on our team brings a unique and diverse perspective to our work. We vary in ethnic, religious, and cultural identity. There is 27 years of age between our oldest and youngest employee and a wide variety of educational and professional experiences. We are proud that over 50% of our team is female and that multiple languages are spoken in our homes. We are located at the</p>

	<p>epicenter of cultural diversity in Dallas. The majority of our team not only works in Oak Cliff, but lives there as well - integrating where we work with where we live, eat, pray, and play.</p>
<p>Please list all nonprofit issue areas within which you have worked as a paid employee or consultant.</p>	<p>Urban greenspace development and connectivity, economic mobility, animal welfare services, addressing child poverty, teen pregnancy prevention, creating safer neighborhoods, adults with severe mental health, health and education services for West Dallas, South Dallas, and Oak Cliff, child obesity, child and adult literacy, education through mentorship, and prison entrepreneurship programming, arts and culture, public safety, religious persecution, and disaster relief.</p>
<p>Please provide any other information you feel would aid in understanding the value the firm can bring to Better Together Fund grantees and any specific expertise you have in a specific BTF grant phase(s).</p>	<p>With fifteen clients and a combined 40 years of fundraising experience in North Texas, we have been able to establish a comprehensive perspective of the philanthropic market. While we value the diversity of our client list, many of them provide overlapping services to impact similar populations. We also discover overlap in strategic approaches to the problems they are tackling. Although we keep donor information completely confidential between our clients, we also regularly see commonalities among our clients' donors and giving affinities in North Texas. As a Better Together Fund consultant, we would seek to unite nonprofits with common missions, values, and funders to multiply impact in the North Texas area. We are equipped to make recommendations for partnerships and consolidations among organizations, empower passionate nonprofit starters to make connections to pre-existing nonprofits with similar missions, and encourage better stewardship of donor dollars that will make a</p>

	more effective and efficient impact in the nonprofit community.
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CONSULTANT #1 DETAILS	
Name	Andrew Snow
Email Address	andrew@track15.com
Education (list only name of school, major, and degree)	Southern Methodist University, MBA; University of Oklahoma, Zoology
Employment History (list only name of employer, title, and dates employed)	University of Oklahoma, Assistant Director of Alumni Relations (July, 2001 - August, 2003) Southern Methodist University, Director of Alumni Relations (Sept, 2003 - December, 2015) Dallas Children's Advocacy Center, Chief Development Officer (January, 2015 - June, 2017) Track15, Co-Founder, Managing Partner (June, 2017 - Present)
Awards or Certificates	N/A
Nonprofit Board Membership (list only name of organization and the dates served)	Lakewood Elementary Expansion Foundation (LEEF) 2016-2017, Lakewood Early Childhood PTA 2013-2019

CONSULTANT #2 DETAILS	
Name	Julie Griffith
Email Address	julie@track15.com
Education (list only name of school, major, and degree)	University of Texas at Austin, BS, Public relations, Texas Tech University, ME.D, Education
Employment History (list only name of employer, title, and dates employed)	University of Texas at El Paso, Director of Development and Alumni Relations, 2004-2007, Southern Methodist University, Reunion Giving Officer, 2007-2012
Awards or Certificates	N/A
Nonprofit Board Membership (list only name of organization and the dates served)	Lakewood Elementary Expansion Foundation (LEEF) 2016-2017, Lakewood Early Childhood PTA 2013-2019

CONSULTANT #3 DETAILS	
Name	Joel Rothermel
Email Address	joel@track15.com

Education (list only name of school, major, and degree)	Southern Methodist University, BA, Psychology
Employment History (list only name of employer, title, and dates employed)	Preservation Dallas, 2006-2007, Database Administrator, DiscoverDallas! Survey Center for Nonprofit Management, 2007 - 2018, Director of Operations Track15, 2018 - Present, Strategic Developer
Awards or Certificates	Salesforce Certified Administrator, Certificate in Nonprofit Management
Nonprofit Board Membership (list only name of organization and the dates served)	Aberg Center for Literacy Event Committee 2017-Present, Kessler Park UMC Finance Committee 2014-2018, Chair 2017 & 2018

CLIENT REFERENCE #1	
Name of Organization	North Texas Alliance to Reduce Unintended Pregnancy in Teens (Ntarupt)
Please provide the name(s) of other organizations involved in the collaboration or negotiations.	N/A
Client Reference – Contact Name	Terry Greenberg, CEO
Client Reference – Contact Email Address	tggreenberg@ntarupt.org
Client Reference – Phone Number	214-717-6477; ext: 2
Please briefly describe the engagement.	Track15 provides major donor relations services and strategy to Ntarupt in the way of prospecting potential donors, major donor moves management tracking within their database, and weekly strategy calls with the CEO. We develop annual giving campaigns including: EOY letter, Spring Appeal, Summer Appeal, and North Texas Giving Day. Additionally, Track15 is involved in the major donor strategy and collateral development for their annual Film Contest event.

CLIENT REFERENCE #2	
Name of Organization	Southern Gateway Public Green Foundation
Please provide the name(s) of other organizations involved in the collaboration or negotiations.	N/A
Client Reference – Contact Name	Katie O'Brien

Client Reference – Contact Email Address	Katie@davisadvocates.com
Client Reference – Phone Number	214-755-9728
Please briefly describe the engagement.	Track15 provides major donor relations services and strategy to the Southern Gateway Public Green Foundation. These services include grant writing, identification and research of major donors, weekly strategy calls with the Executive Director, and database management. As part of the identification process, Track15 researches giving history, strategic alignment with existing stakeholders, and extensive preparation with the Executive Director and Board members directly involved in the solicitation process. Additionally, Track15 prepares and maintains collateral pieces including, website, social media, pitch decks, brochures, and other leave-behind pieces.

Please provide any additional client references.	
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