



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?	Jeremy Gregg dba Gregg Partners
Please provide the legal structure of the firm.	Independent consultant operating as a DBA.
What year was the firm founded? (if applicable)	2014
How many individuals work in the firm?	1
Please provide the names and title of key individuals in the firm who would potentially be working as part of this RFQ.	Jeremy Gregg, Founder & President
Please provide the consultant's or firm's website.	www.JeremyGregg.com
For an independent consultant. How long has the applicant been working as a consultant? (if applicable)	Full-time since 2014; part-time since 2006.
Please provide a list of languages spoken by staff.	English

PRIMARY CONTACT INFORMATION	
Name	Jeremy Gregg
Address	346 Classen Drive,
City/Town	Dallas
State/Province	TX
Zip/Postal Code	75218
Country	USA
Email Address	Jeremy@GreggPartners.com
Phone Number	214-727-9829

Please describe the geographic area served by the firm.	Nationwide, with a primary focus on North Texas.
What are your firm's primary areas of practice?	1) Revenue strategies for nonprofits and social enterprises; 2) Impact strategies for foundations and philanthropists; 3) Planned

	giving and endowment support for established nonprofits.
How many Better Together Fund projects that were awarded funding have you been involved with?	0
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.	I have actively consulted with several groups that are in the process of applying, or which have a grant in place, but have not been actively involved with the BT Fund. My work has been complementary but not formally connected (although my advice did play an important role in them applying).
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.	1. EXAMPLE ONE: Restructuring a Global Entity In 2018-2019, I led a global consulting engagement with The Wikimedia Foundation (the organization that owns Wikipedia) to develop a long-term revenue strategy that could align the foundation with its global partners (e.g. Wikimedia Deutschland, a separate entity); the Wikimedia Endowment (a separate entity); and community of 200,000+ extremely active volunteers. There was deep concern that the strategy could result in a "Wikipedians vs Wikimedians" eruption, which could threaten the viability of the entire movement if it were mishandled. Simultaneously, there was overwhelming concern that the existing approach was not working and that revenues needed to dramatically scale to achieve The Wikimedia 2030 Vision ("a world in which every single human being can freely share in the sum of all knowledge"). My goal was to develop a strategy that could align the organization around a revenue model that could scale from \$100M per year to \$250M+. The process required interviewing 40+ key leaders across the organization; conducting a SWOT analysis on the existing revenue model; developing and presenting 40+ concepts for for-profit ventures to launch underneath the nonprofit; and securing

	<p>internal alignment between all departments for a substantial overhaul of their core revenue model (philanthropy). The process was so successful that I was invited to present the plan at the organization's annual conference, and was then invited to lead a second engagement to build a vital component of this plan: launching a planned giving program that could mobilize long-term growth of the Wikimedia Endowment.</p> <p>2. EXAMPLE TWO: "Collaborate or Die" I led the turnaround of The PLAN Fund (a local microlending organization), which resulted in its successful merger with PeopleFund. When I started, the organization had <2 weeks of cash on hand and was spending \$3 for every \$1 that it loaned (and there was an abysmal repayment rate that had eroded the loan corpus to <\$100K). I established five strategic partnerships with other nonprofits (CitySquare, Genesis Women's Shelter, the Prison Entrepreneurship Program, YWCA/Wings, and Greater Dallas Hispanic Chamber of Commerce) that allowed the organization to double its loan volume, improve repayment rates to +90%, and cut costs by over 40% compared to prior year. This led to a merger with PeopleFund, a successful microlender in Austin. The resulting organization, PeopleFund Dallas, was able to thrive with a local lending capacity of \$5M+ (around 4000% more than The PLAN Fund when I began).</p> <p>3. EXAMPLE THREE: Mergers and Managing Growth I served on leadership team (as Development Director) at CitySquare/Central Dallas Ministries during a time of significant restructuring (as the organization grew its annual operations from ~\$4M to \$10M+). As my department grew from 1.25FTE to a department of over 6 FTE, the organization grew from <50 employees to a team of over</p>
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	<p>230. I reported to the CEO and was involved in conversations that included the launch, restructuring, and closing of multiple departments (some of which were larger than most nonprofits); the merger with the Greater Dallas Community of Churches; the launch of multiple community initiatives that engaged multiple collaborators (Urban Engagement Book Club, the development of CityWalk@Akard, the launch of AmeriCorps, the partnership with Dallas Housing Authority to operate the community center at Roseland Homes, etc.); the beginning of the organization's dramatic expansion into government funding (which required partnering with the other members of the Metro Dallas Homeless Alliance); and many more. The hallmark of this experience was leading the \$10M+ capital campaign for CityWalk@Akard, which required an extraordinary amount of collaboration internally (to ensure that it did not come at the cost of our rapidly accelerating annual fund) as well as externally. The latter involved supporting the CEO in navigating partnerships with the City of Dallas (including working directly with elected officials), the Downtown businesses, churches, and schools that would be affected by this 15-story housing community for the chronically homeless; and the broader community of nonprofits with which we would partner to make the project successful. The experience - which included many things that we did well and several painful "lessons learned" -- laid the foundation for my approach to managing growth and engaging community stakeholders.</p>
<p>How would you describe the range of diversity reflected in your firm?</p>	<p>As an independent consultant, my firm lacks diversity. A particular challenge is that, as a heterosexual white male from Highland Park, my background provides a very stilted view</p>

	<p>of the challenges facing our community. While I have worked very intentionally to address the biases and blindspots within my perspective -- including 18 years of working on diverse teams -- it needs to be acknowledged that my firm lacks diversity in race, gender, sexual orientation, and economic background. However, over the course of my career, I have seen significant challenges presented by teams that lack diversity. I have witnessed how leadership teams (both at the board and staff level) that are comprised primarily of people from my background have made inferior decisions, including decisions that have contributed to the challenges that the organizations seek to address. I have also seen how my own limited worldview has led to some of the worst decisions that I have made in my career. To address this deficiency within my perspective and my work, I am an active member in the World Affairs Council, the Dallas Black Dance Theatre: Encore! Partners, and Conscious Capitalism Dallas. I have also been an active participant at multiple Dallas Truth, Racial Healing & Transformation (TRHT) events and I serve on an advisory board for My Possibilities (an organization that serves the intellectually and developmentally disabled). Since 2006, I have also been actively volunteering in Texas prisons, where we are forced to directly confront the structural inequities facing people of color, people with low incomes, and people who live in the United States who are not citizens of this country.</p>
<p>Please list all nonprofit issue areas within which you have worked as a paid employee or consultant.</p>	<p>My background includes working at two "sector-level" organizations: I was the VP of Development for the Center for Nonprofit Management, as well as the Founding Executive Director for Executives in Action. This allows me to be extremely comfortable</p>

	<p>with nonprofits of all varieties, stages, and structures. This particularly positions me to work well with sector-level organizations and issues that affect the overall nonprofit community. However, as a consultant, my career has focused on health and human services, particularly social services. Major areas have included: - Social entrepreneurship (including for-profit subsidiaries of 501c3s as well as for-profit, for-good businesses) - Prison re-entry / recidivism - Incarceration (adult & youth) - Poverty - Workforce Development - Job Training & Career Readiness - Hunger Relief - Homelessness - Community Development - Foster Care - IDD (Individual & Developmental Disabilities) - AIDS/HIV - Microfinance / microlending - Domestic violence - Literacy - Charitable health clinics - Legal Aid - Mental Health - Substance Abuse - Affordable housing - Youth development - Afterschool / Summer program - Outdoor education / Camping As a consultant to the Pat & Emmitt Smith Charities, as well as several other grantmakers, I am also qualified to facilitate projects involving philanthropic institutions. I have some experience working with arts/cultural organizations, but do not consider myself qualified to lead an engagement in that area. Similarly, I have previously worked with one significant client in the research space (The SETI Institute), but do not consider myself qualified to assist with engagements involving research institutions. I have no experience working with hospitals or higher education, and would not be a good fit for projects involving such organizations (unless they were connected to the aforementioned issues). I have deep experience working with faith-based organizations, including the</p>
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	<p>communities of faith that support them, but likely am not a good fit for projects focused solely on houses of worship.</p> <p>Geographically, my experience has primarily been with domestic organizations. I have also supported a number of Dallas-based organizations whose missions primarily impacted Africa (including Akola, ALARM, and others).</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>ADDITIONAL INFORMATION My experience as a facilitator is informed by not only the experiences above, but the following: - As a Certified Mindfulness Teacher (CMT), I bring an understanding of how to set a container for a powerful conversation; how to prepare the participants to bring their best selves; and how to focus on the shared mission rather than individual agendas. - As a Certified Fund Raising Executive (CFRE) and a Chartered Advisor in Philanthropy (CAP), I bring a robust understanding of the overall development process. This ensures that I always consider the financial sustainability of the collaboration/restructuring/etc. in addition to the operational and programmatic impact. SPECIFIC EXPERTISE FOR BTF I do two things very well: 1) Visioning particularly seeing the unseen; 2) Equipping ... particularly developing a plan to bring that vision into being. As a result, I believe that I am a best fit for either stage 2 (Planning) or stage 4 (Better Together).</p>

CONSULTANT #1 DETAILS	
Name	Jeremy Gregg
Email Address	Jeremy@GreggPartners.com
Education (list only name of school, major, and degree)	University of Texas at Dallas. Executive MBA. Southern Methodist University. BA, English. Southern Methodist University. BA, Advertising (Creative).

<p>Employment History (list only name of employer, title, and dates employed)</p>	<p>Gregg Partners, Founder & President (2014 to Present) Mission Allies Publishing, Founder & President (2019 to Present) Daddy's Time Out, Founder & Author (2019 to Present) Shift/Co, Founding Member (2019 to Present) Prison Entrepreneurship Program, Chief Development Officer (2012-2014). The PLAN Fund, Executive Director (2011-2012) Executives in Action, Founding Executive Director (2009-2011) Center for Nonprofit Management, Vice President of Development (2008-2009) CitySquare, Director of Development (2004-2008) Camp Fire USA Lone Star Council, Director of Development and Communications (2001-2004)</p>
<p>Awards or Certificates</p>	<p>- 2019 CAP® (Chartered Advisor in Philanthropy) via the American College of Financial Services; - Three-time TEDx speaker on the topic of mass incarceration (2012, 2013, and 2014); - Two-time speaker and one-time Master of Ceremonies at Ignite Texas (TED-style event in Dallas); - Three-time speaker at The Warden Exchange, a nationwide gathering of prison leaders; - Keynote speaker on the topic of mass incarceration at the Corrections Technology Association; American Marketing Association; Institute of Internal Auditors; North Central Florida Nonprofit Center's annual summit; executive leadership events for BP and Accenture; and many more; - 2017 Business Success Story (SCORE / Lewisville Chamber of Commerce) - 2014 "Best Pitch Presentation" (CodeLaunch competition for embryonic technology startups); - 2013 "Nonprofit Communicator of the Year" (Center for Nonprofit Management); - 2012 "TEDx Pitch Winner" (Dallas Social Venture Partners' BigBangTX); - 2008 "Certified Fund Raising Executive" (CFRE); - 2004 Hunger Justice Leader (Bread for the World).</p>

Nonprofit Board Membership (list only name of organization and the dates served)	My Possibilities (Pending, should start in 2020) Camp Fire Lone Star (2015-2019) Crossroads Community Services (2009 – 2014) Prison Entrepreneurship Program (2007 - 2012)
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CONSULTANT #2 DETAILS	
Name	
Email Address	
Education (list only name of school, major, and degree)	
Employment History (list only name of employer, title, and dates employed)	
Awards or Certificates	
Nonprofit Board Membership (list only name of organization and the dates served)	

CONSULTANT #3 DETAILS	
Name	
Email Address	
Education (list only name of school, major, and degree)	
Employment History (list only name of employer, title, and dates employed)	
Awards or Certificates	
Nonprofit Board Membership (list only name of organization and the dates served)	

CLIENT REFERENCE #1	
Name of Organization	Bonton Farms
Please provide the name(s) of other organizations involved in the collaboration or negotiations.	Behind Every Door and BridgeBuilders
Client Reference – Contact Name	Daron Babcock
Client Reference – Contact Email Address	daron@bontonfarms.org
Client Reference – Phone Number	972-982-2245
Please briefly describe the engagement.	I have worked with the team at Bonton Farms for several years to support their

	efforts to envision and to build the beloved community. This ongoing engagement has primarily focused on a long-range impact strategy supported by short-term fundraising.
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CLIENT REFERENCE #2	
Name of Organization	Pat & Emmitt Smith Charities
Please provide the name(s) of other organizations involved in the collaboration or negotiations.	Multiple funding & program partners
Client Reference – Contact Name	Dana Vilardi
Client Reference – Contact Email Address	dvilardi@ejsmithenterprises.com
Client Reference – Phone Number	Available upon request
Please briefly describe the engagement.	I have worked with the leadership team at the Pat & Emmitt Smith Charities to develop a more collaborative model of fundraising that aligns their key donors'/stakeholders' priorities with their community programs.

Please provide any additional client references.	AIDS Services of Dallas: Chris Turman at cturman@aidsdallas.org Project Transformation - National: Eric Lindh at lindh@projecttransformation.org Teen Life: Chris Robey at chris@teenlife.ngo
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