



## 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?	Mission Plus Strategy Consulting, Inc.
Please provide the legal structure of the firm.	S-Corporation
What year was the firm founded? (if applicable)	2006
How many individuals work in the firm?	2
Please provide the names and title of key individuals in the firm who would potentially be working as part of this RFQ.	Jean Butzen, President & Foundation Janice Rankin, Administrative Manager Rashmi Narsana, Operations & Revenue Analysis
Please provide the consultant's or firm's website.	<a href="http://www.MissionPlusStrategy.com">www.MissionPlusStrategy.com</a>
For an independent consultant. How long has the applicant been working as a consultant? (if applicable)	14 years
Please provide a list of languages spoken by staff.	English

PRIMARY CONTACT INFORMATION	
Name	Jean Butzen
Address	1 E. Wacker Drive, 24th Floor,
City/Town	Chicago
State/Province	Il
Zip/Postal Code	60601-1474
Country	United States
Email Address	<a href="mailto:jean@missionplusstrategy.com">jean@missionplusstrategy.com</a>
Phone Number	312-445-9938

Please describe the geographic area served by the firm.	United States of America
What are your firm's primary areas of practice?	<ul style="list-style-type: none"> <li>• Nonprofit mergers</li> <li>• Asset acquisitions</li> <li>• Parent-subsidiary arrangements</li> <li>• Joint ventures</li> </ul>

	Partnerships • Collaborations • Networks
How many Better Together Fund projects that were awarded funding have you been involved with?	None to date
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.	None to date
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>Community Partners for Affordable Housing: A Three-Way Merger For years, three nonprofit organizations in the same county worked in the same field of affordable housing. They each had a different mission: Affordable Housing Corporation of Lake County (AHC) specialized in for-sale scattered site homes and foreclosure prevention; Community Partners for Affordable Housing (CPAH) provided a unique “community land trust” strategy, which made single family homes permanently affordable in middle-class suburbs; and Lake County Residential Development Corporation (LCRDC) specialized in developing affordable rental housing and property management. But the three executive directors knew that despite their best individual efforts, they could not achieve the level of impact they wanted to have in the community. In April 2017 they engaged M+S Consulting to complete a merger feasibility analysis including an examination of the finance, program, governance, and organizational pros and cons of a potential merger. The feasibility analysis came back extremely positive, and the JNC prepared a letter of intent (LOI). From there, they immediately moved into a merger negotiation process, which M+S also facilitated starting in 2018 with a board Joint Negotiating Committee plus the three executive directors. The M+S facilitator drafted the merger case, memorandum of</p>

	<p>understanding, and budgets. Meanwhile, legal counsel completed the due diligence and identified the proposed legal relationship between the three entities. The parties closed in December 2018, and launched their merger in January 2019 under the name “Community Partners for Affordable Housing,” with one of the Executive Directors named as the President. Family Shelter Service and Metropolitan Family Services – DuPage: A Merger There wasn’t any emergency happening at Family Shelter Service. Family Shelter Service (“FSS”) was the only provider of domestic violence services in all of DuPage County, located west of Chicago. What drove their E.D. to consider a merger was the need to strengthen her administrative systems, but it had to be with the right partner, and that partner was the Metropolitan Family Services (“MFS”). MFS in DuPage is the largest provider of community services in the County, with services ranging from behavioral health to early childhood services. The corporate organization had annual revenues in FY ’18 of \$56M. The two organizations brought in M+S to prepare a merger feasibility analysis in January, 2018, of their proposed merger. The final report was very positive, and so the boards approved a letter of intent to negotiate a merger to be overseen by a Joint Negotiating Committee, composed of an equal number of board representatives plus a staff executive from each nonprofit. The first step in the merger process was to negotiate a memorandum of understanding. The MOU outlined the proposed purpose of the merger and the goals, along with the governance and operations plan. The three-year goals included creating a comprehensive victim-directed service model, and making DuPage County a benchmark community for</p>
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	supporting domestic violence victims. The parties completed their MOU in December, 2018, closed on their merger in February, 2019, and launched the merger April 1, 2019. M+S assisted with the implementation plan roll out, as well.
How would you describe the range of diversity reflected in your firm?	Employees: 50% diverse Consultant Advisers: 40% diverse
Please list all nonprofit issue areas within which you have worked as a paid employee or consultant.	Nonprofit Restructuring and the following: Our consulting services include: <ul style="list-style-type: none"> <li>• Searching for an appropriate partner</li> <li>• Analyzing the feasibility of a merger or partnership</li> <li>• Facilitating identification of the mission, vision, values, and strategic planning goals between partners</li> <li>• Preparing the business case for a strategic alignment</li> <li>• Negotiating partner agreements</li> <li>• Coordinating the steps leading to closing and launch</li> <li>• Implementing a new operating agreement</li> <li>• Researching expenses and revenue</li> <li>• Identifying expertise in human resources, funding, outcome planning, legal services, and other areas of operations</li> </ul> Specialized Consulting for the Following: Organizational Development Strategic Planning Fundraising Board Development Leadership Development
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).	M+S Consulting is expert at nonprofit restructuring and that is our sole focus. We are particularly good at assisting organizations with facilitating the agreements between organizations. We have excellent partnerships with other consultants who are needed for specific tasks, and bring those relationships to the engagement. We are flexible and easy to work with. We have references available upon request.

CONSULTANT #1 DETAILS	
Name	Jean Butzen



Email Address	Jean@MissionPlusStrategy.com
Education (list only name of school, major, and degree)	Antioch College Yellow Springs, Ohio B.A., Political Science
Employment History (list only name of employer, title, and dates employed)	Mission + Strategy Consulting President & Founder 2006 - present Lakefront Supportive Housing 1987 - 2005 Logan Square Neighborhood Assn. 1982 - 1986
Awards or Certificates	<p>☐ Chicago Sun-Times, "100 Most Influential Women in Chicago," Named 4th Most Powerful Woman in the Nonprofit Sector</p> <p>☐ Harvard Business School Club of Chicago, fellowship to the HBS forum Strategic Perspectives in Nonprofit Management</p> <p>☐ Arthur Morgan Award, Antioch College Alumni Association</p> <p>☐ W. Clement Stone Award, Uptown Chamber of Commerce</p> <p>☐ Honorary Diploma, Archeworks</p> <p>☐ Leadership Greater Chicago, 2001 Distinguished Fellow and Class Fellow</p> <p>☐ Outstanding Achievement Award for Community Leadership, YWCA of Metropolitan</p> <p>☐ 40 Under 40 Award, Crain's Chicago Business</p>
Nonprofit Board Membership (list only name of organization and the dates served)	National Public Housing Museum Secretary/Board Director 2015 - present

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	Community Partners for Affordable Housing
Please provide the name(s) of other organizations involved in the collaboration or negotiations.	Lake County Residential Development Corporation Affordable Housing Corporation of Lake County
Client Reference – Contact Name	Rob Anthony, President
Client Reference – Contact Email Address	ranthony@cpahousing.org
Client Reference – Phone Number	847.263.7478 ext. 22
Please briefly describe the engagement.	M+S provided merger analysis, facilitation, and implementation services for a three-way merger of three affordable housing agencies in Lake County Illinois, over 2018 - 2019.

CLIENT REFERENCE #2	
Name of Organization	Tower Grove Park Merger
Please provide the name(s) of other organizations involved in the collaboration or negotiations.	Friends of Tower Grove Park
Client Reference – Contact Name	Bill Reininger, Executive Director, Tower Grove Park
Client Reference – Contact Email Address	BReininger@TowerGrovePark.org
Client Reference – Phone Number	314-397-5912
Please briefly describe the engagement.	The board of Tower Grove Park wanted to merge with the separately incorporated Friends of Tower Grove Park. For years, donors confused the two nonprofits. The stakes were now significant with the upcoming 125th anniversary of Tower Grove Park, when they intended to launch a large capital campaign to improve the park. But feelings ran deep with the Friends'

	<p>organization and they valued their independence; previous attempts to merge had failed. M+S was brought in to see if we could break through the impasse and successfully facilitate a new letter of intent between the parties. M+S conducted one-on-one meetings with the leadership, and then launched a series of negotiation sessions between the parties. Ultimately M+S was successful in getting the leadership of both nonprofits to agree to a common vision and to accept terms requested by each party which were written into a letter of intent. The LOI was approved by each board of directors. A few months later, the parties had an attorney prepare a merger agreement which each board of directors approved, and they are now merged and preparing for Tower Grove Park's special anniversary.</p>
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<p>Please provide any additional client references.</p>	<p>Terri Davis, Executive Director Vision Forward TDavis@VisionForward.org</p>
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