



## 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?	Rita Fuerst Adams; DBA Charitable and Philanthropic Management Counsel
Please provide the legal structure of the firm.	Independent Consultant
What year was the firm founded? (if applicable)	1997
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.	Rita Fuerst Adams President
Please provide the consultant's or firm's website.	www.rita1st.com
For an independent consultant. How long has the applicant been working as a consultant? (if applicable)	23 years
Please provide a list of languages spoken by staff.	English

PRIMARY CONTACT INFORMATION	
Name	Rita Fuerst Adams
Address	1536 Silverleaf LN,
City/Town	Concord
State/Province	CA
Zip/Postal Code	94521
Country	United States
Email Address	rita@rita1st.com
Phone Number	617.947.9668

Please describe the geographic area served by the firm.	United States, Canada, and other parts of the world where the organization has ties, or desires to build ties, to the United States
What are your firm's primary areas of practice?	Rita Fuerst Adams works with nonprofits and social impact organizations to build, increase,

	<p>and diversify their revenue streams. She transforms charitable and philanthropic organizations at the heart of social change into professionally run, better funded, effective organizations. She is dedicated to serving social problem solvers and their new and emerging organizations. In addition to creating teams of volunteers and staff members, her specializations include:</p> <ul style="list-style-type: none"> <li>• Leadership Development</li> <li>• Restructuring boards, creating advisory committees, and advising on recruitment and retention</li> <li>• Providing a range of board programs and training, especially in fund development. Recruiting, cultivating, and engaging volunteer teams</li> <li>• Organizational Development</li> <li>• Developing strategic plans</li> <li>• Creating mission and vision statements</li> <li>• Launching new not-for-profit organizations</li> <li>• Growing state and regional not-for-profits into national organizations</li> <li>• Expanding into new markets, including the development of affiliate programs</li> <li>• Collaborations and partnerships; Mergers &amp; acquisitions</li> <li>• Fund Development</li> <li>• Establishing and implementing full-range development and earned income programs</li> <li>• Designing and directing fundraising campaigns</li> <li>• Revitalizing existing development programs</li> <li>• Conducting feasibility/market research studies</li> <li>• Preparing case for support</li> </ul>
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<p>How many Better Together Fund projects that were awarded funding have you been involved with?</p>	<p>None to date</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>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>Working with my client in Massachusetts we have developed 2 earned income ventures. Both are based on their key, mission talents serving children and adults with autism. The first developed its services in Florida with the intent of moving into other states. The second venture provides test preparation for credentials in the field. The agency acquired the for profit business.</p>
<p>How would you describe the range of diversity reflected in your firm?</p>	<p>It is diverse by the clients I have served. Each client is unique as well as their culture. With this view and respect I serve organizations with clients, board members, and volunteers who are diverse in all aspects of the word.</p>
<p>Please list all nonprofit issue areas within which you have worked as a paid employee or consultant.</p>	<p>For more than two decades, and throughout the U.S., Rita has served charitable and philanthropic organizations with operating budgets of \$1 million to \$1.5 billion and resulting campaigns ranging from \$1 million to \$450 million. Her experience includes working with causes in education, youth, the arts, community and economic development, historic preservation, health care, international relations, and professional and civic affairs.</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>Rita taught Entrepreneurship for Nonprofits for the masters in Organizational Leadership at Wheelock College. She has written and published extensively in the field, including editing the book for the Center on Philanthropy, What Fundraisers Need to Know About State and Federal Regulation: How it Can Influence All Aspects of Their Work.</p>



CONSULTANT #1 DETAILS	
Name	Rita Fuerst Adams
Email Address	rita@rita1st.com
Education (list only name of school, major, and degree)	Capital University, MBA Ohio University, Journalism, BSJ
Employment History (list only name of employer, title, and dates employed)	Charitable and Philanthropic Management Counsel, President, 1997-Present The Bill Heim Company, President/Vice President, 1981-1996
Awards or Certificates	Hills of Ohio, AFP chapter, Fuerst Award for Outstanding Community Leader CFRE, one of the first in the United States
Nonprofit Board Membership (list only name of organization and the dates served)	Attorney General's Advisory Committee on Public Charities, Commonwealth of Massachusetts Association of Fundraising Professionals, MA Ohio 4-H Foundation Big Brothers/Big Sisters of Licking County Hills of Ohio Chapter, Founding Director, Association of Fundraising Professionals

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	Amego, Inc.
Please provide the name(s) of other organizations involved in the collaboration or negotiations.	For profit business
Client Reference – Contact Name	Please contact Rita Fuerst Adams.
Client Reference – Contact Email Address	rita@rita1st.com
Client Reference – Phone Number	617.947.9668
Please briefly describe the engagement.	Our goal for our work is to establish and implement a full-range fund development program including earned income. In addition to receiving its first 6-figure gift, Amego has developed 2 earned income opportunities. One was developed by expanding one of its core programs to another state as a pilot for offering in other states. The other is the result of acquiring a for profit business. We have made fund development systemic. It is part of the work of every Director, manager, and staff member. As we continue to explore new opportunities in programming, funding, and marketing we are using the planning tool, Sprint. Using this staff created an easy way for all staff to be Amego ambassadors and to tell its story when they are out in their communities, even when they are grocery shopping.

CLIENT REFERENCE #2	
Name of Organization	Zonta International
Please provide the name(s) of other organizations involved in the collaboration or negotiations.	United Nations
Client Reference – Contact Name	Please contact Rita Fuerst Adams
Client Reference – Contact Email Address	rita@rita1st.com

Client Reference – Phone Number	617.947.9668
Please briefly describe the engagement.	<p>Our goal was to develop and implement Zonta International Foundation’s first endowment campaign; to build a robust planned giving program; and to encourage more individual Zontians to give. Zonta has partnered with the United Nations since the UN was founded in 1945. It is a key component of its global and local philanthropy. We created the Centennial Anniversary Endowment Campaign Committee to lead the effort Zonta wide and Regional Representative Committees to lead the effort in the most districts. Volunteers are cultivating and soliciting all pledges and gifts. We developed the training program to train the trainers and the presentation materials that adapt to the 66 countries where Zonta has districts and chapters.</p>

Please provide any additional client references.	<p>National Parents Organization • Led development of strategic plan with selected national and state volunteers that set the stage to change the organization’s name; develop allies; expand media presence; and build volunteer driven affiliates. •</p> <p>Developed lobbying plan, appropriate structures, and materials to build affiliates in every state. • Expanded its work from Massachusetts to 20 affiliated states. This included merging community and statewide organizations with National Parents Organization. Recruited 300 volunteers and created training program. • Developed a “grade” for every state on shared parenting, based on states’ statutes to use as marketing tool. Please contact Rita Fuerst Adams. rita@rita1st.com 617.947.9668</p>
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