

Legal Name of Consulting Firm or Independent Consultant: Third Sector New England

Legal Structure of Organization: Nonprofit

Year Practice Founded: 2009

Number of Individuals in Firm: 6

Names and Titles of Individuals in Firm:

John Weiser, Partner Libbie Poppick, Partner Louise Stoney, Partner Karen Murrell, Partner Joyce Robinson, Senior Consultant Sharon Easterling, Senior Consultant

Languages Spoken on Staff:

English Spanish (moderate fluency)

Firm or Consultant Address: 89 South Street, Suite # 700

Firm or Consultant City: Boston

Firm or Consultant State: MA

Firm or Consultant Zip: 02111

Firm or Consultant Phone: 617-523-6565

Firm or Consultant Fax: 617-395-2634

Firm or Consultant Website: <http://opportunities-exchange.org/>

RFQ Contact Name: John Weiser

RFQ Contact Phone: 203-508-1460

RQF Contact Email: johnw@bwbsolutions.com

Geographic Area Served by Firm:

Los Angeles County

Any additional, relevant information regarding your consulting project:

The practice does business as Opportunities Exchange. Opportunities Exchange is a sponsored project of Third Sector New England. Third Sector New England is a 501(c)3, and is the entity that enters into contracts, and receives and disburses grant and contract funds on behalf of Opportunities Exchange.

Consultant #1 Name: John Weiser

Consultant #1 Email: johnw@bwbsolutions.com

Consultant #1 Education (list only name of school, major and degree):

Harvard University, Mathematics, Bachelors magna cum laude

Consultant #1 Employment history (list only name of employer, title, and dates employed):

Opportunities Exchange, Partner (part-time) 2009 - present BWB Solutions, Partner 1984-present

Consultant #1 Awards or certifications (list only name of award and date received):

Best Business Book of the Year - Untapped: Creating Value in Underserved Markets. 2006

Consultant #1 Nonprofit Board Membership (list only name of organization and dates served)

HOME - 2012-2014 Jewish Historical Society - 2016-present

Consultant #2 Name: Joyce Robinson

Consultant #2 Email: jrobinson@liifund.org

Consultant #2 Education (list only name of school, major and degree):

Azusa Pacific University, MBA Pacific Oaks College, Human Development, MA University of Illinois, Elementary Education, BS

Consultant #2 Employment history (list only name of employer, title, and dates employed):

Opportunities Exchange (part-time), Senior Consultant, 2016 - present Low Income Investment Fund, Senior Program Officer, 2013-present Rio Hondo College, Adjunct Instructor, 1989-2012 Center for Community & Financial Services, Head Start Site Director, 2006-2010 Center for Community & Financial Services, Even Start Program Director, 2004-2006 Bright Faces Child Development Center, Executive Director, 1998-2003

Consultant #2 Awards or certifications (list only name of award and date received):

Administrative Services Credential, preschool-twelfth grade Elementary Credential, K-8 Community College Instructor Credential, Nursery School and Preschool Education

Consultant #2 Nonprofit Board Membership (list only name of organization and dates served):

National Black Child Development Institute 1990-present Los Angeles Child Care Planning Council 2000-present CAEYC 2005-2006 Child Care Information Services 1998-2010

How many strategic restructuring negotiations have you been involved with? 10

How many NSI funded strategic restructuring negotiations have you or your firm been involved with? 2

Name all NSI-funded negotiations:

Early Learning Alliance Foothill Early Care Shared Services

How would you describe the range of diversity reflected in your firm's consultant?

Among our consultants, we have diversity in terms of gender, ethnicity, and race. We believe that cultural competency is extremely important for excellent client service. Having a culturally competent team improves the rapport with the clients, ensures that the team is able to understand and respond to situations in a nuanced way, and co-create with the clients a plan for action that has a high degree of commitment from the clients. Our primary method for ensuring cultural competency is having

members of the team reflect the diversity of the clients and communities that we serve. Teams may include both Opportunities Exchange staff and other consultants as required to ensure cultural competence.

Briefly describe 1-3 examples of restructuring negotiations with which you have been involved:

Early Learning Alliance: we assisted 11 child care centers to create the Early Learning Alliance, a joint entity through which the centers share information, professional development, fundraising, and joint purchasing. The child care centers are located in South Central Los Angeles, Compton, Watts, Inglewood, and Long Beach. The centers provide early care and education services, primarily to children ages 0 -5. Most of the families served are low-income. We provided research and information on Shared Services to the child care centers. We facilitated meetings of directors of the child care centers as they chose a mission and developed a governance structure for the Early Learning Alliance, and then went on to determine the initial set of services to be shared. Finally, we assisted the directors to create the Shared Services Plan, which details roles, responsibilities, services, costs and funding.

Identify all nonprofit areas within which you have worked as a paid employee or consultant:

- Social Services
- Education
- Social Justice
- Child Welfare
- Housing
- Homelessness

Add any other information you feel would aid in understanding the value you or your consulting firm can bring to a strategic restructuring negotiation:

We focus primarily on Shared Services in early care and education. We also may be able to provide consulting on Shared Services for other human services organizations, depending on the degree of subject expertise required for the strategic restructuring.

Reference Client #1 Name of Organization: Girls Club of Los Angeles

Name of other organizations involved in the negotiation:

CSU Dominguez Hills, Drew Child Development Corporation, Heavenly Vision Educational Center, Hoover Intergenerational Care, Kaiser Permanente Watts Counseling & Learning Center, Mt Saint Mary's Child Development Center, Salvation Army, The Children's Center, The Children's Collective, Inc., The Jeffrey Foundation

Reference Client #1 Contact Name: Gloria Davis

Reference Client #1 Contact Phone: (323) 754-2122 x19

Reference Client #1 Contact Email: gloriadavi@aol.com

Brief description of the strategic restructuring project:

We provided research and information on Shared Services. We facilitated meetings of center directors as they chose a mission, developed a governance structure for the Early Learning Alliance and determined the initial set of services to be shared. Finally, we assisted the directors to create the Shared Services Plan, which details roles, responsibilities, services, costs and funding.

Reference Client #2 Name of Organization: Child Education Center

Name of other organizations involved in the negotiations:

Altadena Children's Center, B'nai Simcha Jewish Community Preschool, Options for Learning—Pasadena, Pacific Oaks Children School, The Children's Center at Caltech

Reference Client #2 Contact Name: Elyssa Nelson

Reference Client #2 Contact Phone:
(818) 354-3418

Reference Client #2 Contact Email: ernelson@caltech.edu

Brief description of the strategic restructuring project:

We provided research and information on Shared Services. We facilitated meetings of center directors as they chose a mission, developed a governance structure for Foothill Early Learning Shared Services and determined the initial set of shared services. Finally, we assisted the directors to create the Shared Services Plan, which details roles, responsibilities, services, costs and funding.

Any additional client references: