

STERLING CONSULTING



ADVISOR OVERVIEW

I have been consulting to philanthropists and nonprofit boards and CEOs for 30 years. In short, I advise philanthropists so they can give better; coach social impact leaders so they can execute better; and bring them together in interesting ways.

I help philanthropists, foundations, and nonprofit CEOs and boards to navigate complicated challenges and big decisions. These might include developing a new strategy, a shift in business plan or organization structure, a big growth plan or turnaround plan, the transition of a founder or long-term CEO transition, or launching a new collaboration or merger. I also provide coaching services to CEOs and board members. I enjoy supporting donor circles, funder and nonprofit collaboratives, and collective impact initiatives that provide higher leverage toward outcomes.

My Clients Are:

- Passionate about advancing humanity and building a “vibrant and just society.”
- Exceptionally curious and eager to challenge themselves.
- Driven to expand their current perspectives of what is possible.
- Clear that real change and paradigm shifts happen through informed risk and pushing conventional wisdom.
- Excited about the power of leveraging diverse perspectives and working in collaboration to amplify great ideas.

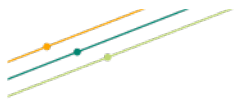
I Work With:

- Foundations, individual and family philanthropists, and donor circles
- Nonprofit founders, CEOs, board members, and executive teams
- Social-benefit entrepreneurs
- Business owners who want to give back

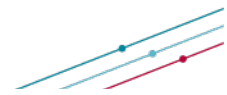
My Services Include:

I work across every mission area, organization size, and stage of development. Generally, I provide value where the client is confronted with a complex situation and doesn't know how best to approach it. The most common “buckets” or names for my work include:

- Philanthropic Counsel
 - The earliest stages of thinking about “giving back”
 - Impact-focused and strategic giving
 - Grantee capacity building
 - Donor circles and funder collaboratives



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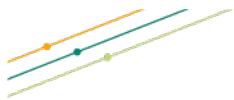
- Navigating New Initiatives and Major Change for Organizations
 - Navigating critical inflection points and change management
 - Organizational capacity building, especially for scaling or rapid growth scenarios
 - Founder / CEO transitions and succession planning
 - Improved governance and governance redesign
 - Vision, impact, and strategy development
 - Business model and org structure design and refinements
 - Retreats, convenings, and team sessions
 - Collaborations, collective impact, and strategic alliances
- Advisory Services for Board Members, Founders and CEOs
 - One-on-one and paired coaching for CEOs and Board Chairs
 - Leadership and skills development and capacity building for leaders
- Keynote Speaking, Presentations, Education Sessions and Workshops

For all of my projects there are process pieces and deliverables – coaching and advisory sessions, strategy frameworks and pragmatic work plans, retreats, workshops and trainings, facilitated conversations, recommendations, org charts, etc. Those are outputs. But the real outcomes are things such as a shift in perspective, higher engagement and buy-in, increased clarity and alignment, better critical thinking, a shared narrative about the legacy and the future, higher mission impact, and increased personal and organizational enthusiasm and resilience.

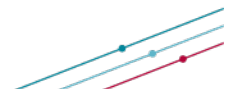
Consultant Roles:

Generally, I serve in three core roles:

- **Experienced Thought Partner.** I bring 30 years of consulting to nonprofits and philanthropists in nearly every mission area, working with thousands of leaders on vision, strategy, change management, reorganizations, growth plans, turnarounds, mergers and collaborations, founder and CEO transitions, leadership coaching, personal and organizational resilience, and many other points of significant inflection. While none of these will provide THE answer, experiences and case studies help to illuminate options and tradeoffs and spur creative thinking to tough questions. In order to come to principled decisions, it is important to engage in solid critical thinking and to leverage the lessons learned of others toward a unique answer that is best for this particular organization. In addition, I can provide a range of presentations, workshops, and educational conversations for board, staff, community stakeholders, partners, funders, and others in your sphere.
- **Process Designer.** In many complex projects with no “right” answer (e.g., we are solving for adaptive challenges rather than technical challenges), the process is at least as important as the final conclusions. I can work with you to think through the various layers of stakeholders, their motivations, their influence, ways to leverage their insights and increase their connection and engagement, and how best to bring them into alignment. In addition, any process is a critical way of ensuring that the organization is modeling its core values and either reinforcing or possibly changing some elements of culture in order to best support the mission.



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- **Facilitator, Capacity Builder, and Change Management Guide.** Most of my projects have a good deal of complexity – otherwise organizational leaders would have no issues tackling them on their own. There are generally numerous stakeholders, perspectives, and variables to consider throughout the process. Decision making usually involves layers of exploration, vetting, and narrowing – and leveraging both data and intuition. I leverage my experience facilitating groups to bring clarity out of complexity, and I support organizations to develop their own capacity to navigate future inflection points.

Guiding Principles and Values:

- **Courage:** I am driven to – and work with people who are willing to – question longstanding norms and underlying assumptions, challenge our beliefs and behaviors, and dare to pursue social change.
- **Collaboration:** Complex problems require multiple skills, perspectives, ideas, and thinking styles. This may come from a collaboration of individuals, or of organizations, or of governments. I don't believe any lasting change can come without it.
- **Integrity:** Sometimes an idea just can't stand up to "the gut test." Progress is not really progress if you lose your center or compromise your values. There is no success without integrity.
- **Thirst for Learning:** I will never stop learning and challenging myself. There is a real danger to proclaiming to be "the expert." I work best with people who are curious, open, self-reflective, and thrive in a "culture of inquiry".
- **Zest for Life:** I work hard and I love it. And I could not do any good work without a sense of possibility and joy. I do my best work with people who bring energy, enthusiasm, and the ability to laugh our ourselves.