



Partners for Success.

2023 ANNUAL REPORT



A Letter from the President

At Transform Consulting Group (TCG), we believe every organization has exponential opportunity and untapped potential. They're driven by *changemakers*—individuals who lead with passion, and believe that all it takes is one person, one organization, one mission to improve the way people live, work, love, and thrive in our world. That's why partnering with TCG centers on uncovering and activating what *already exists*. Whether that's through training and team building, data and insights, research and planning, and beyond—together, we collaborate, assess, facilitate, and create solutions that strengthen leaders, teams, organizations, and communities.

2023 was a tremendous year for our shared successes. Our clients are ever-committed to overcoming complex social issues and barriers their communities face, and our results-driven work emboldens them to make an even greater impact.

This year, we identified opportunities to augment our clients' successes: by further investing in ourselves. This included an audit of how we can better serve clients—from an added emphasis on our team's leadership development to honing our brand (and the tools we use to communicate it!). We are always in enthusiastic pursuit of improvement, internally and externally.

Our passionate and experienced team continues to best position ourselves to help our clients make a difference. We look forward to all the ways we'll transform together in 2024!

Your Partner for Success,



Amanda Lopez
President, Transform Consulting Group



About TCG

We Do More with Data

TCG is a national, strategic consulting and project management firm. We work with government agencies, nonprofits, education partners, and philanthropic organizations to overcome complex challenges and drive meaningful transformation.

We work closely with each of our clients—fellow Transformers—to help them strategize, conceptualize, analyze, and prioritize to fulfill their mission and achieve their desired outcomes.

"TCG's dashboard has helped in making informed decisions, strategic planning, prioritization efforts, and the development of partnerships. Harnessing timely data assists in uncovering hidden trends and patterns, and validating assumptions. The dashboard's presentation of compelling data has led to more efficient operations, customer satisfaction, and has helped us to tell our unique story and impact."

— TANYA URQUIETA, LUTHERAN SERVICES IN AMERICA

Our Approach



Collaborate

We work *with* our clients, not simply *for* them. We believe in the importance of building our clients' capacity to sustain and accelerate the work beyond our engagement.



Assess

We ground our work in the data, gathering the latest research in industry trends and collecting new data as necessary. Then, we develop a solid plan for the future.



Facilitate

Before turning the data, research, and identified best practices into a plan for our clients, we gather key partners to facilitate consensus on the best plan and path forward.



Create

We develop, design, and recommend plans, policies, programs, and reports to accelerate timeframes and improve outcomes, monitoring success to ensure the greatest impact.

2023 Impact by the Numbers

64%

of Clients Were
New Clients

15

Data Dashboards Created

1,700+

Key Partner Survey
Responses Gathered

12

Community Needs
Assessments Conducted

3

New Team Members

2,500+

Individuals Attended
TCG-Facilitated Webinars,
Trainings, Workshops,
or Presentations

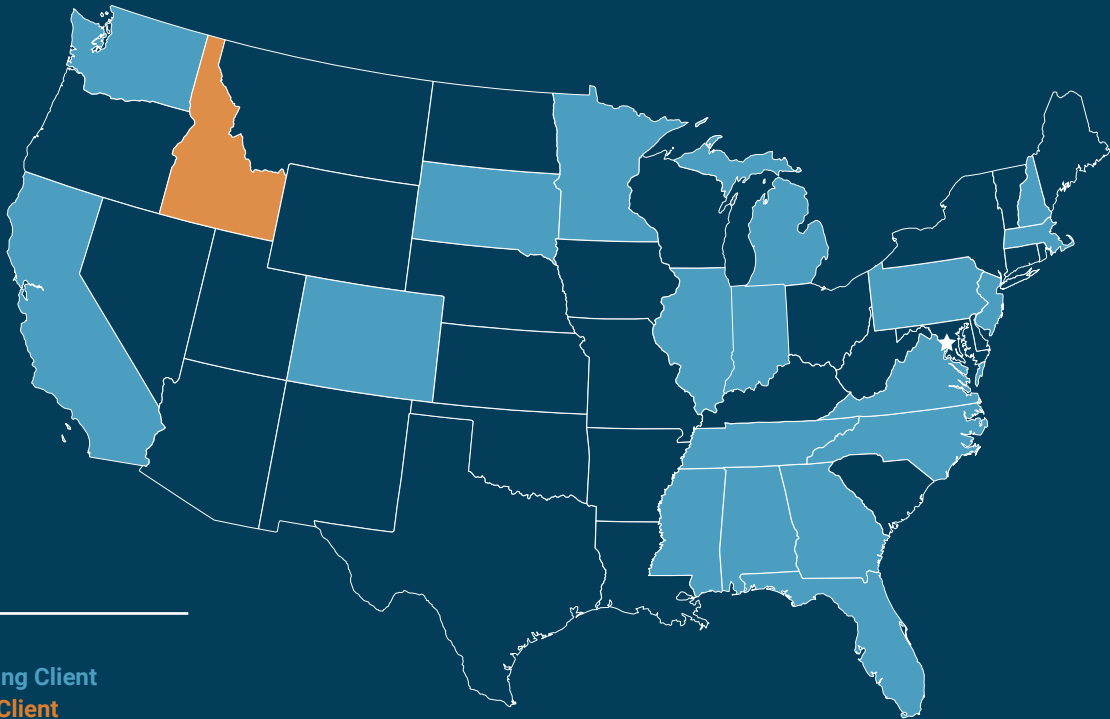
8

Strategic Plans Created

5

Evaluations Completed

States Reached: 21



- ▶ Alabama
- ▶ California
- ▶ Colorado
- ▶ Florida
- ▶ Georgia
- ▶ Idaho
- ▶ Illinois
- ▶ Indiana
- ▶ Massachusetts
- ▶ Michigan
- ▶ Minnesota
- ▶ Mississippi
- ▶ New Hampshire
- ▶ New Jersey
- ▶ North Carolina
- ▶ Pennsylvania
- ▶ South Dakota
- ▶ Tennessee
- ▶ Virginia
- ▶ Washington
- ★ Washington, DC

KEY
Existing Client
New Client



Collaborate for Change

Community Foundation of Greater Fort Wayne

PHILANTHROPY

The Community Foundation of Greater Fort Wayne (CFGFW) inspires enduring philanthropy by encouraging charitable giving, conducting meaningful grantmaking, and leading community initiatives. This work occurs in five pillars, one of which is **Connected Community**. Within this pillar, their goal is to affect change by advocating for the underserved, instilling pride, and building relationships to create a sense of belonging. CFGFW believes that an effective nonprofit ecosystem contributes to a Connected Community, and set out to understand and improve their social sector as a way to support the work of this pillar. TCG partnered with CFGFW to conduct a study that resulted in the **Collaborate for Change Social Sector Ecosystem Strategy**.

Through this work, we conducted state and national research to establish a baseline for understanding the social sector ecosystem as a whole and create benchmark comparisons. Then, we gathered quantitative and qualitative data from residents, organizations, partners, donors, policymakers, key partners, and grantmakers to understand local perceptions, needs, and opportunities. These results informed a new social sector ecosystem model and corresponding 5-year plan for the Greater Fort Wayne social sector ecosystem, with new goals to pursue under CFGFW's leadership.

The five-year plan outlines a roadmap for how the community can increase awareness, improve data and information sharing, strengthen infrastructure and collaboration, and ensure equal access for all.

RESULTS

700+

Responses in 2 Surveys

7

Grantmakers in
1 Focus Group

15

Interviews with
Donors, Policymakers
and Key Partners

1

Plan to Catapult Change

Centralized Information. Improved Collaborations.

Lutheran Services in America's Rural Aging Action Network (RAAN)

NONPROFIT

Lutheran Services in America's Rural Aging Action Network (RAAN) is a national collaborative that builds a stronger continuum of care for older adults and caregivers in rural America. Its community-informed approach expands services by leveraging the unique assets and resources in rural communities—along with the characteristic strength and resilience of older adults and caregivers—to remove barriers to care.

With RAAN leaders and programs spanning the country, Lutheran Services in America needed a centralized resource to understand its program data to help its leaders more effectively collaborate. TCG partnered with the organization to develop an easy-to-read data dashboard that gives the internal teams access to the data metrics and visualizations. This allows Lutheran Services in America to better understand and use their programs' data, make real-time program improvements, and learn from one another's programs.

The dashboard has four main sections organized by the program's objectives including engaging older adults, mobilizing community partners, and addressing gaps in care. On each page, key data points are highlighted. RAAN leaders can also filter, making it easy to find data and trends. The data dashboard has helped the RAAN leaders identify areas of strength, leading to conversations on possible solutions and program improvements within its organizations.



RESULTS

300

Lutheran Services
in America Member
Organizations in 1,400
Communities United
Across the Country

3

Team Data Trainings

1

Dashboard to Support
Collaboration and
Improvement

1

Data Glossary and
Reporting Guide

14

RAAN Leaders Trained
to Use the Dashboard
in Trip to North Dakota

388

Older Adults
Connected to 1,001
Services by RAAN
Member Organizations

As of December 31, 2023

Creating Systems-Level Strategy

The Good Food Collective

NONPROFIT

The Good Food Collective (GFC) strengthens the Southwest Colorado regional food system by addressing food security, food justice and equity, and food economy. Through interactions with the LatinX community they serve, they learned that lack of child care and educational opportunities act as a barrier to food security, preventing many from working.

Because of this insight, GFC sought to comprehensively understand the LatinX community's early care and education (ECE) needs. TCG helped the organization convene an ECE task force made of LatinX and ECE key partners, who worked to identify goals and strategies to strengthen early care and education in La Plata County. We also gathered quantitative data from public sources and qualitative data from a variety of key partners, providing an ECE community needs assessment report and strategic plan that will inform future initiatives.



RESULTS

.....

1

Task Force with
Ten Members

.....

15

Interviews with
Key Partners

.....

10

Focus Groups

.....

50

Survey Participants

.....

36

Instances of
Interpretation
and Translation

.....

1

Community Needs
Assessment and
Strategic Plan in both
Spanish and English to
Support Food Security

Support for Growing Opportunities

Indiana Office of Early Childhood and Out-of-School Learning

GOVERNMENT

The Indiana Office of Early Childhood and Out-of-School Learning (OECOSL) is a division of the Indiana Family and Social Services Administration and oversees early childhood education and out-of-school-time programs. The agency hoped to increase child care access as a way to support working Hoosier families through their Employer-Sponsored Child Care Fund. This \$25 million grant program provides seed funding for employers and local communities to expand employer-subsidized child care benefits to grow local child care opportunities.

OECOSL sought TCG’s support in the development and launch of this program. TCG developed a business case for employers to invest in child care, use case examples for the grant program, created and facilitated two webinars for potential applicants which included convening a panel of community and business leaders, and completed a formative evaluation of the program.

RESULTS

.....

1

Business Case

.....

8

Use Case Examples

.....

2

Facilitated Webinars

.....

1

Formative Evaluation



Training Transformers

Welborn Baptist Foundation

PHILANTHROPY

Welborn Baptist Foundation (WBF) seeks to help nonprofit organizations across 14 counties in Indiana, Illinois, and Kentucky thrive and transform. They fund change by investing in nonprofit excellence and funding programs with high community impact. Recently, they launched the *Grow* initiative, which supports organizations from all sectors in collaborating to grow their capacity for impact.

WBF sought to enrich the initiative by engaging TCG to facilitate a series of trainings for nonprofit and philanthropic leaders in the community, strengthening their ability to fulfill their missions. TCG worked with WBF to determine which training topics would have the greatest impact for local leaders, building a custom series that included topics focused on *Data Literacy*, *Data-Informed Giving*, and *Using Data in Grant Writing*.

RESULTS

.....

6

Trainings to Build
Nonprofit Data
Literacy Capacity

.....

60

Attendees



"Through their insightful training and facilitation, Transform Consulting Group has consistently delivered valuable expertise and innovative strategies, empowering nonprofits to achieve their missions more effectively. Their team's dedication, adaptability, and expertise are truly commendable, and we are confident that their contributions will continue to drive positive change in our community."

— CANDICE PERRY, CHIEF CAPACITY BUILDING OFFICER, WELBORN BAPTIST FOUNDATION





A One-of-a-Kind Partnership

At TCG, we're an extension of each client's mission. We work tirelessly to provide the tools, systems, actionable data, solutions, and outcomes that accelerate impact.

We are no ordinary group of strategists, data analysts, project managers, and consultants. Our team wakes up and goes to sleep with the same vitality and vigor for transforming our world as our clients do—as you do.

Ready to partner for success?

Contact us at 317-324-4070 or by visiting TransformConsultingGroup.com/contact.



TRANSFORM
— CONSULTING GROUP —

Contact us to start your organizational transformation.

144 S Wabash Street
Wabash, IN 46992

317-324-4070
TransformConsultingGroup.com

Sign up for our
newsletter!

