

SARA A. PETERSON, JD – MANAGEMENT CONSULTANT

Overview

Sara has been a management consultant to nonprofits, government, foundations, and community groups for over twenty years. She provides practical governance and board development assistance; designs and implements a wide range of planning and facilitation processes; evaluates programs; and assesses organizations. Since beginning practice in 1998, she has assisted hundreds of organizations from small, all-volunteer start-ups to a multi-billion-dollar funder. Her portfolio has spanned the United States and included organizations in Africa, Asia and the Caribbean.

Current Endeavor

Sara Peterson Consulting, Bloomington, IN

Management Consultant and Owner, Sep 2010 – present

Providing a wide range of organizational development / capacity building services to nonprofits, government, foundations, and community groups, such as:

- Strategic planning and process facilitation
- Practical governance advice and board development services
- Organizational assessment and recommendations
- Foundation support
- Stakeholder and sector research
- Professional development and board training

"Sara worked on a 4-½ year evaluation of our \$1.1 million Wallace Grant.... I also watched her present data and results on a number of other major projects in the Twin City area. ...

Her writing abilities as seen in their various reports were first class. Sara has an uncanny ability to speak the truth in simple yet thoughtful ways. Reports were written with clarity and purpose.

Sara sets a manageable timeline and always meets the deadlines. She is indeed a pleasure to work with and is flexible to changes that the client makes in schedule and timeline as well.

Quite frankly, I am often not a great fan of consultants in general. The old statement, "Give me your watch and I'll tell you what time it is," is often true in describing a consultant's work. However, Sara Peterson completely blew me out of the water with her professionalism, gentle nature, and incredible ability to grasp what we were trying to accomplish.

You would not go wrong in working with her."

Executive Director
State Arts Agency

Professional Experience

LarsonAllen LLP, Minneapolis, MN ¹

Independent Contractor to Nonprofit & Government Group, Aug 2010 – Apr 2011

Managing Consultant in Nonprofit & Government Group, Aug 2003 – Aug 2010

Consultant in Nonprofit & Government Group, Dec 2000 – Aug 2003

Worked in national consulting practice of top-20 accounting firm's second largest division

Client Service:

- Generated solutions for nonprofits/foundations within national consulting practice
- Managed portfolio of organizational development, strategic and business planning, and program evaluation projects as well as foundation searches
- Worked with entities in formation, start up, growth, decline/turnaround, and merger
- Conducted on-site case studies in Africa and Asia for a global funder
- Planned/managed regional conference, expanding attendance by 32% over five years
- Trained organizations and delivered presentations on core skills related to governance, evaluation, conflict, and organizational change

Management Responsibilities:

- Co-led strategic planning as well as marketing for national *Nonprofit & Government Group* including development of collateral materials
- Supervised and coached junior consultants and administrative staff

¹ CliftonLarsonAllen LLP as of 1/2/2012

effective strategy, governance and management
for nonprofits, foundations, government, & community groups

James Ford Bell Foundation, Minneapolis, MN

Consultant advancing from Intern to Program Officer, Jun 1998 - Dec 2000

Consulted with \$20 million family foundation and regional firm guiding philanthropy (*Family Philanthropy Advisors*)

- Managed multi-organization collaboration to improve youth opportunity, stabilize housing, build community, and improve livability in high-crime neighborhood
- Administered grant programs (*application review, funding recommendations, board presentations, constituent communications*), intern programs, and special activities
- Managed information systems for firm, including conversion to new database system

Iowa Department of Human Services, Child Support Recovery Unit, Des Moines and Burlington, IA

Attorney, Dec 1996 - Sep 1997; Assistant County Attorney, Dec 1995 - Nov 1996

- Managed substantial caseload (five and six-county jurisdictions) establishing paternity and child support orders through judicial and administrative means, including oversight, modification, and enforcement of orders
- Advised privatized portion of agency and provided legal counsel to administrative staff in general work of agency

Education

Hubert H. Humphrey School of Public Affairs, University of Minnesota, Minneapolis, MN - Graduate Study

Nonprofit Management Concentration (including program evaluation, collaboration, conflict management and feminist organizations); completed all coursework toward master's in public policy, Jun 1999

- Positions:*
- Teaching Assistant to Professor Melissa Middleton Stone, Mar - Jun 1999**
Graded student papers, assisted in course preparation, and guided group project work for *Planning & Management of Organizational & Interorganizational Relationships*
 - Student Coordinator for Alumni Tuition Grant Program, Jan 1998 - Apr 1998**
Organized fund drive: coordinating volunteers, soliciting incentive gifts, and documenting program
 - Research Assistant for Center for Urban & Regional Affairs, Apr 1998 - Feb 1999 and Oct 1997 - Jan 1998**
West Side Safe Neighborhood Council: Conducted research into factors contributing to St. Paul's low crime rate
Sexual Exploitation Resource Institute: Designed and executed statistical research culminating in writing and publication of *Prostitution in Hennepin County: A Review of the Criminal Justice Response Between January 1, 1996 - July 31, 1997*
- Activities:* Alumni Tuition Grant recipient, Representative to Public Affairs Student Association

University of Iowa College of Law, Iowa City, IA - J.D. with high distinction (ranked in top 20%), May 1995

- Positions:*
- Research Assistant to Professor Mary Dudziak, Sep 1994 - May 1995**
Conducted research in civil rights law, foreign policy, and Supreme Court history
 - Research Assistant to Professor Burns H. Weston, Apr 1993 - Oct 1994**
Assisted in compilation and editing of original edition of multi-volume *International Law and World Order: Desk Set of Basic Documents*, including research in international law
 - Prosecuting Intern for Scott County Attorney, May 1994 - Aug 1994**
Prosecuted simple misdemeanors, assisted with victim intake, conducted juvenile justice and mental commitment proceedings, and researched legal issues for senior attorneys
- Activities:* 3rd Place Overall, 2nd Place Brief: National Native American Law Students Association 1995 Moot Court Competition; Member, Iowa Society of International Law & Affairs; Vice President, Organization of Women Law Students & Staff; Volunteer, Domestic Violence Intervention Program
- Licenses:* Minnesota: Nov 1998 (inactive since 2003); Nebraska: Sep 1996 (inactive since 2002); Iowa: Jun 1995 (inactive since 2002)

University of Iowa, Iowa City, IA - B.A. in French with minor in music, May 1992

Activities: Hawkeye Marching Band, Concert Band, Chamber Orchestra, and Flute Choir

Specialized Skills & Knowledge

Board Governance & Nonprofit Law

Highly versed in nonprofit governance, tax-exempt legal requirements and Internal Revenue Service regulations, as well as academic and practitioner literature for the sector

- Completed Certificate of Nonprofit Board Consulting through BoardSource (Aug 2018)
- Continuing education via Minnesota Continuing Legal Education

Organizational Development & Change

Highly versed in organizational and change theory as practiced over consulting career

- Eight years coaching with nationally-recognized author Dr. Susan Kenny Stevens on theory and application of *Nonprofit Lifecycles: Stage-based Wisdom for Nonprofit Capacity*

Conflict Mediation

Adept at managing conflict in groups, integrating mediation practice into consulting to manage intransigent and combative groups (e.g., *planning with racially-charged board of directors, facilitating highly partisan city council*)

- Completed Certified Mediation Training: Minnesota Continuing Legal Education (1999), Humphrey School of Public Affairs (1998)

Research & Evaluation

Adept at a wide range of qualitative and quantitative methods resulting from over 14 years of mixed-method research and complex program evaluation (e.g., *review of grantmaking program to 64 organizations over 15 years*)

- Continuing education via American Evaluation Association and Minnesota Evaluation Studies Institute

Computer Systems

Broad proficiency in professional packages, adapting quickly to new / customized systems

- Current systems: Microsoft Office, SurveyMonkey, Acrobat Pro, Sched.com, Donor Perfect, Wix, Google Workspace, Origami

Foreign Languages

Limited conversational proficiency in French and recognition of Dutch

Service to Community & Professional Memberships

Current

Association of Government Risk Pools (AGRiP) – Partner Member since 2015

BoardSource – Consultant Member since 2011

Select History

WFIU Public Radio – Community Advisory Board – Chair 2017 – 2019, Member 2015 – 2021

Monroe County Humane Association – Chair 2012 – 2018, Interim Executive 2013 – 2014

Nonprofit Alliance of Monroe County – Training & Outreach Committee 2011 – 2016

International Association of Public Participation USA – Great Lakes Chapter Treasurer 2011-2018, Board Member in 2012, Member and advisor beginning 2009

Textile Center of Minnesota – Board Secretary 2009 – 2010

International Association of Public Participation – Governance Panel 2009 – 2010

Charities Review Council – Marketing Committee 2007 – 2010, Forum Task Force 2010

Minneapolis League of Women Voters – Advisory Board Member 2003 – 2010

Women's Foundation of Minnesota – Public Affairs Committee 2003 – 2004

Hubert H. Humphrey Institute of Public Affairs Alumni Association – Board of Trustees Member 1999 – 2002, Vice President 2000 – 2001, President 2001 – 2002; Student Mentor 2001 – 2004

American Society of Association Executives – Member 2009 – 2010, presenter in 2009

American Evaluation Association – Member 2002 – 2009, reviewer and presenter 2008

Minnesota Women's Campaign Fund – Member and Volunteer 2001 – 2003

Public Risk Management Association (PRIMA) – Member 2016 – 2018

The Nonprofit Centers Network – Member 2015 – 2017

Bloomington Rotary Club – Member 2014 – 2016

ARNOVA – Member most recently in 2013

Greater Bloomington Chamber of Commerce – Member in 2011 – 2012

Indiana Evaluation Association – Member in 2011

Indiana Council for the Arts – Member in 2011

"Best experience I've ever had doing a strategic plan... which may not sound flattering as strategic plans tend to be dry, but you made it fun, efficient, exciting and the deliverables are second to none. Thanks for showing me what a GREAT facilitator can do!"

Executive Director
Local Arts Federation

"Sara has injected knowledge of the nonprofit sector, creative marketing and communications ideas, enthusiasm and a healthy dose of practical common sense.

She's bright, energetic and upbeat – an invigorating combination that, I can attest, makes those around her better."

Executive Director
Charities Review Organization

Presentations & Writing

Demystifying Generative Governance, Challenging the Notion of EFFICIENT Meetings, and (RE)Setting the Table for Better Decision-Making

AGRiP Webinar Series for Governing Bodies - Fall 2021
AGRiP Governance 2020 - Mar 2020

Assessing Impact & Learning as We Go: Evaluation in All its Glory

Indiana Arts Homecoming - Oct 2017

Effective Board Governance for Pools

AGRiP 2016 Governance & Leadership Conference - Mar 2016

Ready. Set. Policy!

Nonprofit Alliance of Monroe County - Oct 2015

Process Improvement in Pooling

NLC-RISC Staff Conference - Oct 2014

Good Boards & Good Governance: When the basics aren't so basic...

Region 4 Workshop, Tippecanoe Arts Federation - Mar 2014

Breaking Down the Silos: Cross-Functional Collaboration in Pooling Organizations and Succession Planning for Pools: Preparing the Next Generation of Pool Leaders

NLC-RISC Staff Conference - October 2012

Helping Your Board Manage its Annual "To Do" Lists

LarsonAllen 17th Annual Nonprofit & Foundation Conference - May 2010

Conflict in the Council Chamber: How Staff Can Help

LarsonAllen 1st Annual Nonprofit & Government Training Academy - Apr 2010

Development v. Finance: Healthy Balance or Organizational Liability

Minnesota Planned Giving Council Educational Seminar - Jan 2010
Minnesota Planned Giving Council 33rd Annual Conference - Nov 2009

Conflict at Clients

LarsonAllen In-Service for *Health Care and Nonprofit & Government Groups* - Jun 2009

Boards of Directors in Recession Mode

Aging Services of Minnesota Annual Meeting & Leadership Forum - Sep 2009
LarsonAllen 16th Annual Nonprofit & Foundation Conference - May 2009

A Double Header: Understanding Boards of Directors & Understanding Strategic Planning

University of Minnesota Buckman Fellowship Seminar - Apr 2009

Good Governance: Implementing Practices & Principles

American Society of Association Executives Great Ideas Conference - Feb 2009
The Warhol Foundation Initiative National Convening - Jun 2008
LarsonAllen 15th Annual Nonprofit & Foundation Conference - May 2008

Evaluating the Impact of Spending: A Foundation Case Study in Performance Assessment

American Evaluation Association Annual Conference - Nov 2008

Research Methods

LarsonAllen In-Service for *Nonprofit & Government Group* - Jul 2008

Best Practices: Understanding Grants Management from National, State & Voluntary Perspectives

National Conference on Tobacco or Health! - Oct 2007

Evaluation: Where Mission, Planning & Accountability Unite

LarsonAllen 14th Annual Nonprofit & Foundation Conference - May 2007

Living Your Mission: Making Change Happen and

From Strategy to Action: Effective Implementation & Adaptability

LarsonAllen 13th Annual Nonprofit & Foundation Conference - May 2006

Sustainability: A Way of Being

Technical Assistance ALLIANCE for Parent Centers Leadership Institute - Aug 2005

Creating a More Effective Board and Benchmarking for Success

LarsonAllen 12th Annual Nonprofit & Foundation Conference - May 2005

Finding the Value in Evaluation

LarsonAllen 11th Annual Nonprofit & Foundation Conference - May 2004

"Sara is a brilliant nonprofit management consultant that can help organizations move to a much higher level of governance and management.

I highly recommend her."

Executive Director
Arts Center

"I always found [Sara] to be a smart and conscientious colleague dedicated to getting the job (no matter how complex) done on time. She particularly excelled at research, evaluation and assessment. We also worked together on numerous complex strategic plans, and she was an outstanding partner on these jobs too."

Partner-in-Charge
LarsonAllen LLP

Published Articles

Go! Guides: Evaluation & Board Fundraising

Foellinger Foundation

Planning for Sustainability in Nonprofits

EFFECT Magazine: Summer 2007

Risky Misconceptions

EFFECT Magazine: Summer 2006

Don't Overlook the Value in Evaluation

EFFECT Magazine: Fall 2004

Did You Know?

EFFECT Magazine: Winter 2003/04