
IDEALIST CONSULTING BIO

About Idealist Consulting

Over the last eight years Idealist consulting has delivered consulting services to a number of prominent socially responsible organizations. Some of our clients include established nonprofits such as Nike Foundation, American Red Cross, National Coalition of the Aging, Outward Bound and others.

Idealist consulting was formed in 2000 under the direction of Rob Jordan the director of Idealist Consulting. Rob began his career in project management with McNett Corporation--an international OEM located in Washington State. Roughly six years later Rob joined the Peace Corps where he served as a business development volunteer for the country of Ukraine. After his service Rob began work with an established USAID consulting firm where he was employed as a business analyst assisting public and private sector organizations with technical integration as well as organizational development. It was at this point that Rob developed his vision for a better kind of consulting company. Shortly after completing his contract with USAID he formed Idealist Consulting--specifically designed to advance the mission of Nonprofits through technical, organizational and promotional development. By implementing private sector means toward a public sector ends Idealist Consulting has help improve operations for various organizations dedicated to various missions such as...social services, environmental protection, business ethics, education, disaster relief, local government, theatre development, and others.

Qualifications Summary

- Eight years of project management and business analyst experience.
- Consultants certification is level II or equivalent.
- Certified Salesforce.com Partner.
- Certified Appexchange Partner.
- Certified socially responsible Bcorp.
- Bilingual organization (Spanish and English)
- Original Nonprofit Salesforce Implementation partner.
- Over 130 Salesforce implementations to date (As of 12-30-2008).
- Mission focus toward socially responsible organizations including NPO's, NGO's, B corps.
- Extensive experience in apex code, visual force and s-controls.
- Salesforce.com implementation success with both small and large scale projects, over a wide range of industries and needs.
- Brings a deep skill-set to each project including; project management, solution architecture, process mapping, configuration, data migration, documentation, project leadership and communication.

MISSION AND ETHICS POLICY

Idealist Consulting Mission:

Our objective at Idealist Consulting is to help your socially responsible organization become more efficient while keeping operating costs low and assuring long-term stability. This means your organization can stretch its fundraising dollar further while devoting more time and money to what really counts--your mission.

We do this by applying efficient, private-sector methodologies and adjust them to work within a public-sector/NGO framework. The results are advancements in fundraising, finances, name recognition, human resources, safety, and other aspects of your organization's infrastructure. Thanks to donations of time and resources from our solution partners we can keep our rates lower (as much as 75%) than the industry standard allowing you to get the maximum benefit for your 501(c)(3) status.

In addition to our work with nonprofits we devote 20% of our time and resources to private sector organizations that are actively engaged in philanthropic efforts. In recognition of their efforts they receive a significantly discounted rate.

Consulting Service Ethics Policy:

These are the ethical standards that the Idealist Consulting upholds as essential not only for its clients but for the technology consulting industry as a whole:

- Consultants will be honest and not knowingly misrepresent facts
- Consultants will install and use only properly licensed software on their systems as well as the clients' systems
- Consultants will divulge any potential conflicts of interest prior to accepting the Contract or as soon as possible after the conflict is discovered
- Consultants will only represent opinions as independent if they are free from subordinated judgment and there is no undisclosed interest in the outcome of the client's decision
- Consultants will ensure that to the best of their knowledge they can complete the project in a professional manner both in terms of skill and time
- Consultants will keep the client informed of any matters relating to the contract even if the information is unfavorable, or may jeopardize the contract
- Consultants will safeguard any confidential information or documents entrusted to them and not divulge any confidential information without the consent of the client
- Consultants will not take advantage of proprietary information obtained from the client
- Consultants will not engage in contracts that are in violation of the law or that might reasonably be used by client to violate the law
- Idealist Consulting member firms, their principals and employees will uphold the principles of Idealist Consulting and not commit acts discreditable to Idealist Consulting

Environmental Ethics Policy

Idealist Consulting is dedicated to pursuing the following environmental policies:

- Promote good environmental practice and awareness of its environmental policies
- Promote the use of teleconferencing rather than travel to reduce environmental impact
- Promote the continued development of best practices and expertise in environmental disciplines related to environmental sustainability
- Promote practices consistent with environmental protection
- Minimize the negative impact on the environment, through a process of continual improvement in environmental performance
- Take into account the principles of sustainable development in conducting its administrative, commercial and social activities
- Participate in local initiatives to improve the quality of the environmental

Local Purchasing Ethics Policy

When at all possible Idealist Consulting will actively purchase local materials from ethnic minority owned businesses. This includes office supplies, technical solutions and various other products utilized within its consulting services.

Community Service Ethics Policy

Idealist Consulting makes annual contributions of consulting time to worthy Portland, Oregon community organizations dedicated to community development, environmental protection, business ethics, philanthropy, education, disaster relief, local government, social services and others.

REFERENCES

Below is a listing of the project leaders that we have listed as reference. In the interest of space we have selected these clients to represent a diverse portfolio. For additional references please contact us directly or reference the testimonial section on our web site (<http://www.idealistconsulting.com/testimonials/>). If you prefer to be provided Spanish Speaking clients let us know and we will be happy to oblige.

Out of respect of our clients please be sensitive to the amount of time you devote to your correspondence. Emailing our client first is preferred. Thank you and we look forward to working with you in the future. For a larger client listing visit our client listing on our web site (<http://www.idealistconsulting.com/clients/>).

Client References for Idealist Consulting:

Advocate of Children
Jennifer Pringle
Phone: (212) 822-9546
Email: jpringle@advocatesforchildren.org
Web: www.advocatesforchildren.org
*Implementation of database structure and organizational processes.

Jennifer Barnett
American Place Theatre
Phone: 212-594-4482
Email: jbarnette@americanplacetheatre.org
Web: www.americanplacetheatre.org
*Implementation of database structure and organizational processes.

Heather Miller
National Coalition of the Aging
Phone 540-752-1206
Email: heather@heathermckeeonmiller.com
www.ncoa.com
*Implementation of database structure and organizational processes.

Kathy Armstrong
Portland Community Land trust
Phone: 503- 493-0293
Email: kathy@pclt.org
Web: www.pclt.org
*Implementation of database structure and organizational processes.

Edie Galper
Los Angeles Economic Development Corp.
Phone: 213-236-4825
Email: celeste.lopez@laedc.org

Web: www.laedc.org

*Implementation of database structure and organizational processes.

Diane Keating

Equal Justice Initiative

Phone: 212-998-6716

Email: dkeating@eji.org

Web: www.eji.org

*Implementation of database structure and organizational processes. Referred by NPower New York

Lawrence Leake

Potlatch Fund

Phone: 206-624-6076

Email: Lawrence@potlatchfund.org

Web: www.potlatchfund.org

*Implementation of database structure and organizational processes.

Sarah Lightfoot

Kipp Bay Area Schools

Phone: 415-312-0050

Email: slightfoot@kipp.org

Web: www.kipp.org

*Implementation of database structure and organizational processes.

Laura Peterson

Hands to Hearts International

Phone: 503-936-5574

Email: Laura@handstohearts.org

Web: www.handstohearts.org

*Implementation of database structure and organizational processes including marketing, HR and internal operations.

Web: www.centerstance.com

*Idealist Consulting Relationship: Sub Contractor

ASSOCIATE PARTNERS

Below is a listing of public and private sector consulting groups that Idealist Consulting has worked with over the years. These organizations have called on Idealist Consulting to support their philanthropic efforts in cases of referrals, advisement and client overflow. We appreciate their trust and confidence in our work and look forward to maintaining this relationship.

- NPower Oregon: Idealist Consulting Relationship: Preferred Provider
- NPower New York: Idealist Consulting Relationship: Preferred Provider
- Salesforce Foundation: Idealist Consulting Relationship: Partner
- Salesforce Foundation: B-Corporation: Partner
- Convio: Idealist Consulting Relationship: Partner
- Salesforce Appexchange: Idealist Consulting Relationship: Partner
- Centerstance: Idealist Consulting Relationship: Sub Contractor
- Bluewolf Group: Idealist Consulting Relationship: Sub Contractor

- New Group: Idealist Consulting Relationship: Sub Contractor
- N-Ten: Idealist Consulting Relationship: Member
- One Northwest: Idealist Consulting Relationship: Referral

Associate Partner References for Idealist Consulting

Meghan Nesbit
CRM Donations Manager
Salesforce Foundation
Phone: 415-536-7266
Email: mnesbit@salesforce.com
Web: www.salesforcefoundation.org
*Idealist Consulting Relationship: Sub Contractor

Steve Anderson
Database Program Manager
One Northwest (Salesforce Nonprofit Partner)
Phone: 206-286-1235
Email: steve@onenw.org
Web: www.onenw.org
*Idealist Consulting Relationship: Referral

Anand Sethupathy
Community Investment Manager
NPower New York (Salesforce Nonprofit Partner)
Phone: 212-564-7010
Email: anand@npowerny.org
Web: www.npowerny.org
*Idealist Consulting Relationship: Preferred Partner

Arne Kainu
Executive Director
Centerstance (Salesforce Partner)
Phone: 360-607-9737
Email: akainu@centerstance.com

SOLUTION PARTNERS

Our solution partners contribute time and product to our clients in order to help forward socially responsible organizations. Were it not for their contributions many organizations would be unable to rise to their maximum potential. Below is a listing of some of our solution partners. For additional solution partner listing please contact us directly.

- Dream Host
- E-Bridge
- Salesforce .com
- Demand Tools
- Convio
- Conga
- Crystal Reports
- Vertical Response
- Click Tools

- QuickBooks Online
- Got Marketing
- Acteva

SERVICES

Idealist Consulting provides numerous services beyond the scope of this document. Below is a listing of those services for reference.

Database development and integration: Idealist Consulting has successfully worked with the following database solutions - Salesforce.com, ACT!, Blackbaud Raisers Edge, Access, Gift Tool, Ebase, Giftmaker pro, Goldmine, filemaker. These implementations involved data transfer, project management, training, needs analysis, technology planning and general consultation.

Online Marketing and Integration: Marketing plan, press release, email campaign, online fundraiser, newsletter or promotional design, Idealist Consulting can create the right combination of services tailored to promote the mission of your organization.

Web site development: By integrating your web site directly into your database and online fundraising capabilities you can create holistic foundation of technology that will not only enhance fundraising potential but enhance your ability to track and report the online relationship you develop with your staff, donors, members, volunteers and interest groups.

STAFF

Our staff offers experiences from both the public and private sectors. Each of them brings a skill set that allows Idealist Consulting to deliver reliable services at an affordable rate. For specific information about our Staff please contact Idealist Consulting directly at idealist@idealistconsulting.com.

- Robert Jordan: Executive Director, rob.jordan@idealistconsulting.com
- John Licata: Senior Consultant, john.licata@idealistconsulting.com
- Jim Westfall: Senior Consultant, jim.westfall@idealistconsulting.com
- Mark Bruso: Senior Consultant, mark.bruso@idealistconsulting.com
- David Cheng: Senior Consultant, david.cheng@idealistconsulting.com
- Kevin Laurence: Senior Consultant, Kevin.laurence@idealistconsulting.com
- Tanner Wells: Consultant, tanner.wells@idealistconsulting.com
- Calista Carter: Consultant, calista.carter@idealistconsulting.com
- Freeman White: Consultant, Freeman.white@idealistconsulting.com
- Hudi Falik: Consultant, hudi.falik@idealistconsulting.com
- Chris King: Senior Web Developer, chris.king@idealistconsulting.com
- Ash Shepherd: Web Developer, ash.shepherd@idealistconsulting.com
- Sally Vilardi: CRM Application Consultant, sally.vilardi@idealistconsulting.com

OFFICE LOCATIONS

Idealist Consulting - West (Main Office)
1722 N.W. Raleigh
Mbx 314
Portland, OR 97209

Idealist Consulting - Mountain
P.O. Box 2908
Suite 420
Ketchum, ID 83340

Idealist Consulting - Central
5107 N Belt Hwy,
Unit 111
Saint Joseph, MO 64506

Idealist Consulting - East
3003 Van Ness St. NW
Unit W904
Washington, DC 20008

International Representation:

- Idealist Consulting - Europe (UK)
- Idealist Consulting - South America (Argentina)
- Idealist Consulting - Middle East (Israel)