

## PROPOSAL | DUPAGE COUNTY HISTORICAL MUSEUM

The DuPage County Historical Museum (DCHM) is owned by DuPage County and is operated under the leadership of the Wheaton Park District (WPD). Its mission is to educate the public through the collection, preservation, and exhibition of materials, documenting the history of DuPage County and providing local history services for historical organizations and scholarly endeavors.

Some of the DCHM foundation board members have served for a long time. Others have joined recently and may be new to board service. As a unique entity, board members may be uncertain about their identity, role, and purpose as a foundation and how DuPage County factors in. With developed programs and events, DCHM staff feel now is a good time to ensure all board members are informed and feel prepared in their role and responsibilities.

### PROJECT(S) SCOPE:

This proposal outlines a project to provide board training to the DCHM Board on June 12, 2024, from 4:30 to 7:00 pm. A Better We would provide presentation materials, resources, ideas, training, and tools in support of the board training session. The WPD Executive Director and the Annual Giving & Events Manager will approve all materials and resources. DCHM will provide administrative support to implement this training (i.e., print copies, provide AV support).

The scope includes the following for board training:

- Review of DCHM & Foundation
  - Identity
  - Role
  - Purpose
  - DuPage County role, oversight & appointments
- Relationship, Role & Responsibilities (define and distinguish)
  - Board, as a whole
  - Executive Director – specify traditional ED responsibilities are fulfilled by multiple staff members
  - Board President & WPD ED/Foundation team/Museum Manager (specify at training)
  - Board & Staff
  - Museum Board & Foundation Board
- 3 Ds of Nonprofit Governance
  - Duty of Care
  - Duty of Loyalty
  - Duty of Obedience
- 3 Ds of Board Support
  - Doer – hands on or pro bono support
  - Donor – annual events & annual fundraising appeals/initiatives (give/get)
  - Door Knocker - Connections to their network
- Board Best Practices
  - Outline of key best practices
  - Board Expectations Statement (i.e. meeting attendance/participation)
  - Culture of mutual accountability
  - Individual Board Member Commitment

- Board Assessment Tool
- Sustainability
  - Future of DCHM membership program
  - Potential capital campaign (i.e. permanent exhibit)
- Post-Training Outcomes

#### PROJECT COST:

The hourly rate for new clients is \$125/hour (standard \$175/hour). Hours indicated below are an estimate to complete board training. Only actual project hours are billed in the final invoice and additional hours will be billed accordingly.

- Total hours = 15 hours
  - Project management for board training (13 hours)
  - Training session (2 hours)
- **TOTAL COST = \$1,875**

#### ABOUT A BETTER WE.

A Better We. Services, LLC is a company focused on empowering communities and individuals for the greater good. Shefali M. Trivedi founded the company in March 2023 to deliver project management services, resources, training, and curated events to a growing network of nonprofit organizations, businesses, higher education institutions and community organizations.

Currently, A Better We. manages eight organization clients on a variety of projects, as well as a few individual clients with executive coaching. Projects include board training, strategic planning, DEI training, supporting grant funded projects (specific to the clients) and launching a capital campaign. A Better We. has recently completed three different board training sessions for organizations. Below is some feedback from clients about their experience with A Better We.

#### Board Training:

“Since Diveheart engaged Shefali to help with board development and training we have been very pleased with the results. In addition to prepping the Diveheart directors as to their roles and responsibilities as part of a major fundraising campaign, she has helped guide them through the strategies necessary to successfully execute such a campaign. This has resulted in Diveheart directors becoming more engaged and responsive to every aspect of the Diveheart vision and mission.”

Jim Elliott

Founder & President, Diveheart Foundation

Tinamarie Hernandez

Executive Director, Diveheart Foundation

“From perspective of an Executive Director, the board governance training Shefali delivered was particularly helpful in setting out the different roles and responsibilities of Executive Director and Board Members. With a greater understanding of the importance of ED and Board working effectively together and how this results in organizational success, I am grateful for her training setting a firm foundation for us to continue to grow together. As we move towards our biggest fundraiser of the year, Shefali’s guidance on Board Member roles in fundraising will also be a huge boost to ensure we maximize our reach to potential donors.”

Catherine Lynott

Executive Director, The Outreach House

“The training was very good, and I believe that we all got a lot out of it. I know that I did. The key points I took from Shefali’s training related to governance and the roles and responsibilities of both the Board and the Executive

Director. Specifically, we now have a clearer sense of how these roles and responsibilities need be differentiated from each other. We also see the importance of coordinating these roles and responsibilities across the organization. Shefali shared some of the best practices that we can use to improve this alignment. These will be very useful as we incorporate them into our business processes. This will take some time, but I think that doing this will pay off in the long term in terms of improved performance of our organization.”

Eric Deaton

Board Member, The Outreach House

#### Capital Campaign Launch:

“Shefali’s skill sets and experience run deep and have provided the necessary guidance required to assist the Diveheart team during their capital campaign launch, all the while directing the development of critical strategic marketing, informational and promotional materials necessary to the project. Her leadership and direction have borne fruit that otherwise might have gone unrealized.”

Jim Elliott

Founder & President, Diveheart Foundation

Tinamarie Hernandez

Executive Director, Diveheart Foundation

#### DEI Training:

“I have known Shefali for nearly 20 years. I have always been impressed with her leadership, enthusiasm and networking skills. When we at The Conservation Foundation began our DEI journey, we asked Shefali to join our newly formed Inclusion Council. She immediately had an impact on making us a better and more inclusive organization. We hired Shefali to conduct DEI staff training, as well. Our staff liked her fun and energetic style as she helped make us feel more comfortable being uncomfortable while discussing tough issues. Shefali has been working with our communications staff and helping us talk authentically about our DEI work to both internal and external audiences. We trust her judgment as she has taken the time to truly understand our organization and culture. As a woman of color with unique lived experiences, I would highly recommend Shefali to any organization looking to move the needle on DEI initiatives.”

Brook McDonald

CEO, The Conservation Foundation

#### Additional Projects/On Retainer clients:

“I can clearly say that Shefali was the missing link in my business that I had been looking for, for over 20 years. I know now that we cannot do it without her. She is a highly trained professional and a really friendly, cerebral person who really knows the ins and outs of businesses and nonprofits. You cannot go wrong with her services, and will probably make a new lifetime friend!”

Dr. Alison Thompson

Founder & CEO, Third Wave Volunteers

“I had been wanting to update my new employee onboarding process for a while now. I’d been thinking that a third-party perspective would be really helpful to inform the process. When I met with Shefali, I knew I could entrust her with this project. Together, we are updating the standards for how we support and prepare new employees joining our TPC team. I am confident that the result is an onboarding process that truly reflects our organizational culture, and that supports employee engagement from day one. I truly think that this redesign will have a positive effect on job satisfaction and employee retention. I am so glad I hired Shefali to help me get this important work done for my organization.”

Becky Beilfuss

Executive Director, Teen Parent Connection

## ABOUT FOUNDER & CEO – SHEFALI TRIVEDI

Shefali M. Trivedi is the Founder of ABetterWe.com, a company focused on empowering communities and individuals through project management services, consulting, resources, and curated events.

Ms. Trivedi has over thirty years of experience in marketing, sales and project management and has worked for in the government and nonprofit sectors during the last twenty years. Her career began at Merck & Co. in pharmaceutical sales, and she transitioned to the nonprofit sector with the Greater Chicago Food Depository, one of the largest food banks in the country. Her service career extended to government as she worked on countywide environmental initiatives in DuPage County.

Ms. Trivedi most recently served for nine years as Executive Director of Giving DuPage, the DuPage County Volunteer Center. During her tenure, Shefali was proud of many signature accomplishments for Giving DuPage, including:

- ✓ A 250% increase in volunteer engagement
- ✓ A thousand-fold growth in the digital marketing presence on social networks & email subscribers
- ✓ Creating and developing the first Nonprofit Partners Conference in DuPage County
- ✓ Launching Giving DuPage Days, the first ever giving day type event engaging 7,300 donors and raising over \$995,000 for hundreds of DuPage nonprofit organizations.

She is a sought-after speaker with chambers, colleges, community groups and faith organizations. In 2019, she was a recognized as a recipient of the 'Most Influential Women in Business' award with the Daily Herald Business Ledger.

Ms. Trivedi is a passionate advocate for women's empowerment, social impact, diversity & inclusion, the arts, and sustainability. A Better We. is a female-led, minority-owned business.

## CONTACT INFORMATION:

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A BETTER WE.

## PROPOSAL SIGNED BY:

Shefali M. Trivedi

(print name)

CEO & Founder

(title)

Shefali M. Trivedi

(signature)

4/19/24

(date)

Mahesh B. Bhandari

(print name)

Secretary

(title)

[Signature]

(signature)

4/29/2024

(date)