



ASSESS & RESPOND: *Creating a* **Culture of Continuous Growth** *at ESCSC*

ESC-US Conference
September 12, 2015

Strengthening nonprofits through coaching, consulting, and capacity building

Overview

- Inconsistent Quality
- Lack capacity to Assess/React

Threats

Responses

- Emeritus Initiative
- Evaluation/Outcomes Project

- High Quality
- Culture of Continuous Growth

Evolution

Threats

Emeritus

140 Consultants;
only 80 assignable

Quality control avoidance:

- * alienates unassigned
- * Creates risk to ESC
- * demotivates best consultants

Evaluation/
Outcomes

Reputation without
Refutation

Incomplete and
inconsistent data

Stories not statistics

Quality control is
expensive . . . Lack of
quality control is
disasterous

Emeritus Initiative

Goals and Challenges

- Objective Criteria
- Dignity/Respect
- Personal Communication
- Clear Execution
- Credibility

Procedure

- Redesign Selection and Training
- Emeritus vs. inactive
- Carefully tailored letters explaining changes
- Step-by-step process



Emeritus Initiative

Results

- Response from consultants
- Number of Emeritus recertified or on internal projects
- Quality markedly increased

Evaluation and Outcomes Project

Goals

- Improve quality
- Inform training of consultants
- Demonstrate value to funders
- Cultivate internal change and growth
- Realistic undertaking

Resources – internal & external

Evaluations

*-Internally executed
-Recent project assessment*

Results

- Pilot Project
 - 10 Engagements, 10 Clients, 18 Consultants,
 - 5 Project Advisors
 - Modifications: longer in-person interviews, electronic surveys not ideal, pre-fill forms
- 2nd Phase
 - 24 Engagements, 23 Clients, 31 Consultants,
 - 11 Project Advisors
 - Results: ???

Outcomes

*-Externally executed
-Distant project assessment*

- Institutes
 - Targets:
 - 2012 alumni
 - 33 total (17 NEDI, 16 EDLI)
 - Response Rate:
 - NEDI - 47%
 - EDLI - 37%
- Consultations
 - More qualitative approach
 - 12 of 20 responded (60%)
 - Strengths: coaching modality, knowledge/commitment, connections to resources
 - Improvements: technology, “off-script,” assess client readiness
 - Recommendations: social media and relationship training, clarify expectations

Responses and Reporting

Consultants

- In-depth Request For Assistance form
- Better intake
- “Letting some go”
- Clearer expectations for clients and consultants
- Match meetings and mid-term check-ins

Funders

- Reporting statistics
- Gathering quotes
- Annual report data
- Legitimacy

Staff & Board

- Understanding of projects and scope
- More effective project management
- Enhanced training
- Directions for expansion

Evolution and Impact of Culture of Continuous Growth

Consultants

- Hunger for More
- Respect for colleagues

Funders

- New Legitimacy
- New dialogue

Staff & Board

- Board engagement
- Staff morale and confidence

Emeritus Initiative

Communications & Internal Guides

SUBJECT: Important Announcement for ESC Consultants

Dear ESC Consultants,

I want to begin by again thanking each of you for your continuing commitment to ESC, and for your support and suggestions as I move into my seventh month in this role.

I am writing today to introduce the next step in ESC's continuing evolution. As you have heard over these past few months, one of ESC's primary goals for 2014 is to establish and maintain the highest levels of service to our nonprofit clients in a changing and more demanding capacity building environment. The ESC "brand" should be broadly known throughout the region for its wide range of services, its consistency and, most importantly, its excellence.

As part of the effort to achieve this goal, we are standardizing and improving our practices to reflect the nonprofit sector's changing needs and expectations. We have dramatically upgraded our application, selection and orientation processes for prospective consultants. We are offering continually redesigned best-practice training and professional development. We are even more strongly adhering to a coaching approach in developing our project strategies and conducting our client interactions. We will provide closer oversight of projects, and implement specific measures to address gaps, issues or concerns. And we are developing new review and evaluation processes to strengthen our feedback practices regarding consultant performance and client satisfaction on ESC engagements.

Going forward, the key determinants of a consultant's continuing involvement at ESC will include an evaluation of client projects or institute assignments as well as successful participation in our training programs. This will ensure that everyone in our active consulting Corps has, and effectively uses, the most current information about our approaches and methods.

To reflect this imperative, we have created an Emeritus designation within our consulting Corps, which is distinct from active status. This allows us to honor those who have served the Los Angeles nonprofit community with their talents and dedication over the years, but have recently played a less active role in delivering ESC's services.

As of April 1, 2014, ESC consultants in our Corps who have not attended a training session and served on a client project or institute within the last two years will automatically become ESC Emeriti. Emeritus consultants who are interested in transitioning back to active status will have the opportunity to re-qualify for active status through a reapplication process, which will enable them to learn about the new expectations and requirements for our consulting Corps, and allow us to learn anew about their capabilities and potential fit for future projects. This will also be an entry point to a new, required course of basic training in our core service areas.

At the same time, we recognize that our Corps is a great resource that, as part of ESC's growth and efforts toward even more effective, efficient operations, can potentially assist us in addressing many significant needs and initiatives beyond direct client engagements. Emeritus consultants may be called upon to help with these special, internally-focused projects and activities. They will continue to be important members of our ESC community, and will receive select ESC event invitations, updates and information. Emeritus consultants will not be eligible for placement on consulting projects or to attend trainings and events designed for our active consulting Corps.

In the next few days, we will be contacting our new cadre of Emeritus consultants to confirm their Emeritus status and provide even more detailed information. In the meantime, please contact Janet McIntyre, Director of Programs and Training (jmcintyre@escsc.org), or Vicky Foxworth, Director of Organizational Consulting (vfoxworth@escsc.org), if you have any questions, or if you wish to become an Emeritus consultant at this time and do not receive our follow-up email.

ESC's Board of Directors, Consultants Advisory Council and staff team all support this effort to honor those who have committed so much of their valuable time and energy to serving ESC and its clients, while at the same time enhancing and standardizing our practices. It is a critical step as we evolve to ensure ESC's long-term success in meeting the changing needs of the nonprofit clients we serve.

In closing, I want to again acknowledge how extremely fortunate ESC has been over the years to attract an extraordinarily high caliber and talented pool of consultants. Each of you has committed your time, energies and formidable experience, and has been an integral part of ESC's success and in building the foundation for the next stage in our growth. Thank you all for your commitment to our work, and your dedication to making a powerful difference in the community.

With appreciation,

David

Information Regarding your Emeritus Status

Dear Name,

I am writing as a follow up to Monday's email and to confirm your status as an Emeritus consultant of ESC. As I shared with you then, we have formed this Emeritus designation to ensure that all of our active consultants are equipped with ESC's most current approaches, tools, and training to enable us to effectively and consistently meet our clients' increasing needs and expectations.

As one of our Emeritus consultants, you remain an esteemed member of the ESC community. The ESC community and our clients value and honor your commitment to help us strengthen the nonprofit community and, as a result, touch the lives of thousands of people throughout Southern California. Your willingness to share your time and energy has been an invaluable asset, not only to the agencies we serve, but to ESC as well.

You will continue to be recognized on ESC's website on a new page showcasing our Emeritus consultants, and will receive select ESC invitations, mailings and information. We also recognize that Emeritus consultants are a great resource who can potentially assist us in addressing many significant projects beyond direct client engagements. I hope we can call upon you in the future to help us with internally focused initiatives.

Emeritus consultants are not eligible for placement on client projects or to attend trainings and events designed for our active consulting Corps. However, if you would like to re-enter the active Corps, you have the opportunity to do so through our re-certification process. This process incorporates the steps ESC has been using in our upgraded application, selection and orientation processes for current prospective consultants. This includes learning about the new expectations and requirements for our consulting Corps, and completion of our recently revised Basic Training curriculum. This process will also allow us to learn anew about your capabilities, interests, and potential fit for future projects.

The steps in the re-certification process include:

- * Attendance at an introductory workshop
- * Submission of an application
- * Interview by a member of the interview committee
- * Re-certification as an active consultant
- * Attendance at a New Consultants Orientation
- * Completion of Basic Training sessions in our core service areas

If you wish to begin the re-certification process, please email Program and Communications Coordinator, Nadine Levyfield (nlevyfield@escsc.org) by Thursday, May 1. Or, if you have any questions, please contact Janet McIntyre, Director of Programs and Training (jmcintyre@escsc.org), or Vicky Foxworth, Director of Organizational Consulting (vfoxworth@escsc.org).

Again, thank you for your commitment and contribution to ESC. Your service has had a tremendous impact, and we look forward to staying connected!

With appreciation,
David

Consultant Transition 2014
[with David's input - 3/31/2014]

Summary:

As of **April 1, 2014**, ESC consultants in our Corps who have not attended a training session and served on a client project or institute within the last two years will automatically become ESC Emeriti. Consultants with Emeritus status who are interested in transitioning back to active status will have the opportunity to re-qualify for active status through a reapplication process, which will enable them to learn about the new expectations and requirements for our consulting corps, and allow us to learn anew about their capabilities and potential fit for future projects. This will also be an entry point to a new, required course of basic training in our core service areas.

Bottom Line:

Going forward, the key determinants of a consultant's future involvement at ESC will include an evaluation of client projects or institute assignments as well as successful participation in our training programs for *every* consultant.

IMPORTANT: Buy time. No need to try and resolve everyone's concerns or curiosity immediately. If someone pushes for answers or is upset, let them know we will keep the Corps updated as the process unfolds. And/or you will get back to them with the answer as soon as possible. And if there's a really problematic conversation or person, David will call back.

Frequently Asked Questions

Q: Why are you doing this?

A: This will ensure that everyone in our active consulting Corps has and effectively uses the most current information about our approaches and methods. Over the past several years, the capacity building environment has become more demanding. We are standardizing our practices in this to meet the needs of this changing landscape and better reflect the nonprofit sectors' greater needs and expectations.

Q: Who made this decision?

A: ESC's Board of Directors, Consultants Advisory Council and Staff all support this effort to honor those who have committed so much of their valuable time and energy to serving ESC and its clients, while at the same time enhancing and standardizing our practices. We believe this is a critical step as we evolve to ensure ESC's long-term success in meeting the changing needs of the nonprofit clients we serve.

Q: I requested an assignment/project/institute so why wasn't I assigned?

A: I do not know the specific reasons why you weren't assigned to a project at a particular time. However, if you would like be assigned in the future, you will need to re-qualify for active status so that you have current knowledge about ESC's best practices and how we deliver our services. We want to give our consultants the best opportunities to be successful, and moving forward, we believe that updated training and reorientation to ESC through the re-qualification process is the best way to do this.

Q: My clients loved me/I did x special project for ESC/I won an award at the volunteer luncheon. Why wasn't this taken into consideration?

A: I can't speak to specifics of your situation. However, all of us are grateful to you for all of your contributions to ESC and our clients in your time as an active consultant. If you would like be assigned in the future, you will need to re-qualify for active status so that you have current knowledge about ESC's best practices and how we deliver our services.

Q: How many consultants now have Emeritus status?

A: We'll know specific numbers in the next few weeks as the process moves forward and we talk with individual consultants about the change. We'll update the Corps as this happens.

Q: What about x person? Are they now Emeritus status?

A: We are not sharing any information regarding the status of specific consultants. We'll know how specific individuals are impacted in the next few weeks as the process moves forward.

Q: Does this mean there is a re-training requirement for all ESC consultants?

A: We are instilling an enhanced learning culture at ESC and we are continuing to evolve in this area. This will ultimately include updated training for all consultants to ensure that all active consultants have the same base knowledge of our services and our expectations for what we provide to our clients.

Q: But you (i.e. Janet or Vicky) weren't even on ESC's staff during some of this time to determine if I was fit for a project? So why are you the contact person?

A: The matching of consultants to projects falls within my current responsibilities at ESC. This is a critical step to ensure ESC's long-term success in meeting the changing needs of the nonprofit clients we serve. If you would like be assigned in the future, the re-qualification process provides a way to ensure that we know you in order to properly assign you to projects, and to ensure that you have current knowledge about ESC's best practices and how we deliver our services.

Q: Isn't there any project I can be assigned to at this time?

A: We have made the decision to establish the Emeritus status and requalification process at this time. We may be turning to our Emeritus consultants for assistance in addressing ESC needs other than direct client engagements. Emeritus consultants may be called upon to help with such internally-focused projects. It will all be a matter of "fit," and matching the right Emeritus consultant with our particular needs.

Evaluation & Outcomes Initiative

Communications & Questionnaires

Dear XXXX,

We are committed to continuously improving and maximizing the quality of the ESC experience for our clients and our consulting corps. In this spirit, many of you have expressed a desire for specific input and recommendations to help you continuously grow and improve your effectiveness in serving our clients. ESC is initiating a comprehensive assessment process to collect and analyze feedback from our consultants and clients, and to provide this input to our consultants.

A small group of senior ESC consultants will serve as Project Advisors (PAs) to help implement this new process. A PA will be assigned at the initiation of each project. He or she will solicit and record feedback from both consultants and clients at the midpoint and closeout of all projects. We will ask both parties to assess the:

1. Fulfillment of the project scope
2. Client satisfaction
3. Consultant(s) performance
4. Consultant/Client's level of engagement and commitment to the project
5. Anticipated project impact and project outcomes to date
6. Potential for follow-up work with ESC

The PA will send the client a brief evaluation form to complete prior to calling the client to discuss the criteria above.

The PAs will provide the feedback to ESC staff, and we will provide direct feedback to the consultant(s) specific to each project regarding what went well and what could (or could have been) improved. This process will allow ESC to collect and analyze data that can help us enhance our training and professional development opportunities, and that can be shared with the consulting corps, funders, and prospective clients. This process will also serve as an indicator of the completion of a current engagement and as an invitation for new/renewed projects with the client.

We will pilot the new evaluation process with projects that have recently ended or are nearing completion. Consultants who have served or are serving on these projects should expect a call from a PA or staff member in the near future. The call should last 15-20 minutes. Please let us know if you have any questions.

Thank you so much for your support and ongoing commitment to ESC and the nonprofit community we serve.

My Best,

David Factor

Heads-Up Letter to CLIENTS (Project step #2)

Dear XXXX,

Thank you for choosing to work with ESC. We hope that you had a positive and productive experience with our ESC staff and consultant(s)! In an effort to continuously improve the quality of our services, we have asked a small group of our senior consultants to serve as Project Advisors (PAs) to assist us in an assessment process.

You should expect a call from one of our PAs in the near future. We would greatly appreciate it if you would be willing to meet with the PA for 30-60 minutes to discuss your ESC experience and provide feedback. Client evaluations are critical to helping ESC provide consistently excellent service. We look forward to receiving your feedback.

Thank you again for partnering with ESC. It is our honor to support your good work, and we hope to continue our relationship with you and your organization long into the future. If you have any questions about this process please email or call me.

My Best,

Vicky Foxworth
Director of Organizational Consulting



Template for PAs to Email to Clients (use is optional)

Hi (Client) <-INSERT NAME

This is (PA, **INSERT NAME**), the ESC project advisor following up on the email that ESC sent to inform you about our evaluation process. I would like to schedule a 30-60 minute in-person meeting to get your feedback on the (**Name of Project**). ESC is eager to learn about your experience with the service we provided. I hope you will be willing to have a brief conversation. I am available on:

(INSERT THREE TO FOUR TIME OPTIONS)

Which of these times will work for you? If none of these options work on your end can you please suggest some other times?

Thank you in advance for your time. I look forward to talking with you soon.

Best,

(PA) <- **INSERT NAME**

ESC Client Feedback Form

Project Advisor:

Client Organization: _____ **Type of Project:** (in brackets, start and end date)

Website:

Primary Client Contact Name and Title:

Primary Client Contact Information:

Address:

Consultant(s):

Date: _____ **Meeting Duration:** _____

1. What went well with this consultation?
2. What could have gone better with this consultation?

Scale of one to four: 1= Strongly disagree, 2 = Somewhat disagree, 3 = Somewhat Agree, 4 = Strongly Agree

1. I received high quality services from ESC.

1 2 3 4

Comments:

2. I am satisfied with the consultation outcomes.

1 2 3 4

Comments:

3. Working with ESC helped our organization operate more effectively.

1 2 3 4

Comments:

4. I am satisfied with the ESC consultant/consulting team.

1 2 3 4

General comments:

Comments about specific consultants:

Strengths of each consultant:

Constructive feedback for each consultant:

5. I am satisfied with the effort our organization put into the consultation.

1 2 3 4

Comments:

6. I would work with ESC again.

1 2 3 4

Comments:

7. I would recommend ESC to other nonprofits.

1 2 3 4

Comments:

Summary Questions

1. What else should we know to provide the highest quality and most effective services?
2. As a result of the consultation, what changed in your organization?
3. What impact do you think the consultation had on your clients?
4. What are the greatest needs facing your organization right now?
5. Can we give your name as a reference? Y N

ESC Consultant Feedback Form

Project Advisor: _____ **Date:** _____ **Call Duration:** _____

Client Organization: _____ **Type of Project:** (in brackets, start and end date)

Primary Client Contact Name and Title:

Consultant(s):

Consultant Contact Information:

1. What went well with this consultation?
2. What could have gone better with this consultation?
3. Were the client's needs the same as or different from what was originally scoped?

Scale of one to four: 1 = Strongly disagree, 2 = Somewhat disagree, 3 = Somewhat Agree, 4 = Strongly Agree

1. The client was highly engaged in this consultation. 1 2 3 4

Comments:

2. I was highly engaged in this consultation. 1 2 3 4

Comments:

3. I believe the client was satisfied with the consultation outcomes. 1 2 3 4

Comments:

4. I used the skills I learned at ESC to effectively meet this client's needs. 1 2 3 4

Comments:

5. I believe I/the team helped the client achieve the stated consultation outcomes. 1 2 3 4

Comments:

6. I would work with this client again. 1 2 3 4

Comments:

Additional Questions

1. Please describe the primary achievements and deliverables developed in this consultation. (Please send a copy of any written deliverables to ESC for the project file)
2. What impact you think this consultation had on this client/organization?
3. How easy or challenging was it to work with this client/organization? If there were issues, did you need to modify your approach? If so, please describe.
4. How effective do you think you were as a consultant on this project? What would have helped you to have been more effective?
5. If you were part of a team do you have any feedback on the effectiveness of the team?

6. Is there anything ESC could have done to have better supported your work with this client?
7. Are there any additional needs you think this client has?
8. Are there any needs you currently have that ESC might be able to help you with?
9. What else should ESC know to provide the highest quality and most effective services to clients and consultants?