

# Points of Pride

## Executive Service Corps Southern California

***This past year was one of accelerated transformation. We put into action many important initiatives that are making us stronger and better positioned to meet the changing needs of our region's nonprofits.***

### Financial

- Budget surplus of \$98,000 after success in projects, grants, and individual giving, and reducing costs nearly \$100,000. This reversed an operating deficit of \$170,000 in 2013.
- Cash on hand: highest month-end balances since April 2011.
- New monthly dashboard format provides snapshot of progress against goals in key areas, easier to read and more focused than before.

### Programs

- 60% of 2014 clients were repeat clients.
- Client budgets range from \$40,000 to \$120 million.
- Consulting
  - Doubled the number of consulting projects from the previous year (26 to 55)
  - Increasingly complex consulting projects by new and continuing clients.
  - New service offerings: Organizational Assessment and Meeting/Retreat Facilitation.
- Institutes
  - Combined our two leadership Institutes (one for new executive directors, the other for experienced EDs) into a single cohort offering; improved cost-effectiveness, alleviated staff workload, promoted revision of curriculum and training approaches
  - New “culminating presentation” requirement in our Developing Development Program prompted extreme creativity at the graduation, which was also highly effective in generating grant support and partnership by a new foundation funder.
- Certified as a Service Enterprise organization by California Volunteers, recognizing ESC for successfully and uniquely leveraging volunteers for an effective social mission.

### Consultants

- Emeritus Initiative designed and implemented. Consultants without successful project and training participation within last 2 years were assigned Emeritus status, making them ineligible for project assignments. Emeriti may help with internal ESC tasks but not attend training and activities focused on active consultants. To be considered for active status, they must apply and be accepted for recertification through our new application process.
- Redesigned application and vetting process for new consultants, including greatly clarified expectations and approaches.

- With new processes and resulting higher caliber Corps, our remaining consultants are better prepared for – and committed to – our requirements and approaches, and matching is easier and more efficient.
- Condensed basic consultant training to move consultants through faster and reduce staff time spent in training. Welcomed 28 new consultants, already trained and assigned projects.
- Launched our Service Log, creating an online format for each ESC consultant to track their hours and report them every month. We will be able to report donated hours as revenue through our audit next year.

## Operations

- Assessment Initiatives
  - o Evaluation Projects – completed pilot and began universal implementation to assess overall client satisfaction and consultant effectiveness on recently-completed projects. Goals were to better understand ESC’s impact, to strengthen feedback processes, and to better assess project results and client satisfaction.
  - o Outcomes projects – Gathered data on long-term impact by seeking feedback from Institute graduates and consulting project clients from 2011/12.
  - o The results confirmed the initiatives we’ve undertaken to address issues and have been instrumental in helping refine our programs and grow as an organization both internally and in conversation with funders.
- Staff Team
  - o Filled key vacant position: Director of Organizational Consulting.
  - o Interns and interim talent used extensively to maintain momentum through multiple transitional periods. Undergrad college student interns took on several high priority projects over the summers, including project development and management, website management, and internal/demographic research. Undergrad business student groups and a Masters student conducted and/or coordinated the evaluation project and related operations research.
  - o First ever staff team retreat.
  - o 100% staff giving for the first time ever.
  - o With departure of two key staff members, reorganized staff structure. Recently filled redefined positions (Development Manager, Program & Client Coordinator) and got budget approval for new position of Development & Communications Coordinator.
- Communications:
  - o Updated messages and materials to better reflect core strengths and impact.
  - o Key tactics: sponsorship outreach and story outreach highlighting corporate grant support and detailing the impact of work with a specific client.
  - o Mid-year update letter sent to all contributors updating them on past year’s progress. Not solicitation, just to keep in contact as important members of the community.



### **ESC-Cincinnati: 2015 Points of Pride**

Over 100 Nonprofits Served 2015 thus far

- 55 consulting, coaching and leadership training projects this year (on pace to surpass 2015 projection)

ESCC Volunteer Workforce

- Over 90% of volunteer workforce engaged in external or internal assignments in 2015 thus far (current workforce comprised of over 100 volunteers)

Nonprofit Leadership Development

- Over 70 nonprofit leaders trained and/or coached this year, through independent projects and the NLIGC (Nonprofit Leadership Institute of Greater Cincinnati graduated 40 nonprofit leaders and managers and 34 enrolled in upcoming programs starting this month)

**AND**

Successfully found and welcomed new CEO, Bob Schrage!

**Executive Service Corps of Cincinnati (ESCC)** is a nonprofit organization that provides effective, high-quality, affordable consulting, coaching and leadership development services to nonprofits in the Greater Cincinnati region. We assist nonprofits and community leaders to attain their community goals. ESCC's services focus on strategic planning, nonprofit board development, business and operations improvement and leadership development. ESCC's workforce is comprised of over 100 active and retired professionals sharing their successful career experience and skills without financial compensation. In the 20 years since ESCC's founding in Cincinnati, we have helped strengthen more than 550 nonprofits.

## Executive Service Corps

### Bayer Center for Nonprofit Management @ Robert Morris University



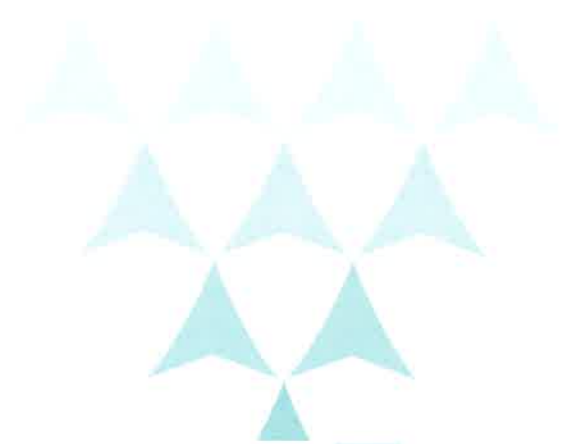
1. Launching the Covestro Employee Engagement Institute ( With 3 year grant)
  - a. ESC (targeting senior level & retiring executives)
  - b. Company sponsored Short-term consulting engagements with nonprofits (with ESC project advisors)
    - i. Short term projects were leveraged with 3 cohorts in Pittsburgh, one in Houston
    - ii. 3 more cohorts in Pittsburgh in 2016
    - iii. Wrote manual for dissemination & replication of project
  - c. BoardsWork! Corporate training of cohort of 20 employees ; 10 grantees receive board assessment, retreat & 2 matched members
  - d. Open forums to educate & inspire other companies to take a more committed approach to community issues
  
2. Excellent year:
  - a. Surpassed revenue goals; hiring new staff, more integrated volunteers within the full Bayer Center staff.
  
3. Using LinkedIn/ Volunteer Match to screen & recruit new volunteers



# Best Year EVER!

## SNAPSHOT: Progress on 2014 Goals (FINAL NUMBERS)

Metric	Year to date	Goal
Total Completed Projects	88	75
Total New Clients	34	33
Active Consultants	57	57
Fees Billed to Nonprofits	\$132,000 (as of 12/31/14)	\$110,000





**ESCOT, Inc.**

**Executive Service Corps of the Tri-Cities**

**Serving Albany, Schenectady and Troy, New York**

### **About Us**

ESCOT provides consulting services to not-for-profit organizations, governmental units, faith-based and educational institutions in the greater Capital District of New York. As one of the independent members of the Executive Service Corps nationally, ESCOT volunteers provide high quality consulting services to large and small clients since its founding in 1987. Our fees are modest since our consultants are all volunteers and work without charge.

The year August 2014 to September 2015 was one of rebuilding for ESCOT. We added new board members, developed a new web site at:

[www.escot-inc.org](http://www.escot-inc.org)

and completed some projects and added several new clients.

Our work for not-for-profits during the past 12 months has included board training and development, developing and training of conflict of interest policies, making

application for and providing advice on IRS tax-exempt status, completion of a cash flow study for a local government, and general advice to not-for-profits on subjects such as homeless veterans, caregivers of individuals with autism, and establishing a cultural entity with outdoor events.

Our current clients include the City of Rensselaer, National Alliance on Mental Illness-NYS, Tribe's Hill Heritage Center, Italia America Cultural Foundation, North Bethlehem Fire Department, Historical Society of the Town of Colonie, and Alliance for Positive Health. We have a working partnership with Albany County Historical Association in which we present workshops to local historical societies in Albany County.

Our partners include LaSalle School and the Retired Public Employees Association of NY State.

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# **ESCCO**

*Volunteer Management Consultants to Nonprofits*

## **Organizational Focus Workshop**

This structured, facilitated exercise is designed to assist a nonprofit organization (its board, management and key stakeholders) identify and prioritize the most critical issues they face and develop an action plan to address them.

### **The Process**

#### **1. Understanding the situation**

ESCCO's team of two experienced consultants will meet individually with the executive director and board chair to understand each of their perspective on the organization.

The ESCCO team will review the organization's mission statement, by-laws, financial reports, communications materials and web site to round out a picture of the organization.

#### **2. Market Position Workshop (Day 1 1 - 2Hours)**

The ESCCO team will lead a structured workshop (participants should include the entire board, the key managers and appropriate other stakeholders) to develop a consensus list of Core products or services, core clients, core competitors, identify the organizations competitive differential advantage and how they will know if they are successful.

Review and affirm organization's mission  
(May need to be revisited based upon discussion which follows)

Core product or service?

Core clients?

(Who have you designed your program to serve?)

Core competitors?

(Those who offer the same or similar product or service to your core clients)

Competitive differential advantage?

(The compelling reason clients should choose your program over others.)

How will you know if you have been successful?

Visualizing the organization's potential future state.

#### **3. SWOT workshop (Day 1 2 – 3 hours)**

The ESCCO team will lead a structured workshop (participants should include the entire board, the key managers and appropriate other stakeholders) to develop a consensus list of organizational Strengths, Weaknesses, Opportunities and Threats within the context of the existing competitive and financial environment.

In addition to the general learning that occurs as part of this process, the list of Strengths, Weaknesses, Opportunities and Threats that have been identified will be used in the next step



**4. Ranking survey (Take home assignment)**

The ESCCO team will email send a questionnaire to each of the participants and ask them to rank the relative importance of each of the Strengths, Weaknesses, Opportunities and Threats (a forced ranking methodology will be used).

A summary of the results will be shared with each of the participants prior to the next step.

**5. Action plan development workshop (Day 2 2 hours)**

Based upon the highest priority issues identified in the ranking survey, and the key gaps that separate the organizations from its "ideal", the ESCCO team will facilitate the development of a specific action plan to address the top five issues.

The objective is to develop a shared commitment to action with identifiable metrics and assigned responsibilities.

**6. Summary memo**

The ESCCO team will prepare a 2 – 3 page memo summarizing the Market Position, SWOT analysis, the ranking results, the success measures and the action plan.



## 501 Commons, including the Executive Service Corps of Washington

### 1 A NEW HOME

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We moved into Pacific Tower, a centrally located historic building overlooking downtown. While we continue to offer a flexible work environment that includes most staff working part or full time work from home, we needed more space for our growing staff – now 40 FTE– and better working conditions for client intake and tech helpdesk staff who are on the phone much of the day.



The building provides significant meeting/event space for us and for other nonprofits located in the building. We will be managing the use of the space by building tenants as well as the use of excess space by nonprofits.

### 2 CONTINUED STRONG PROGRAM GROWTH

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In 2014 we had 566 engagements with 386 clients, not including nearly 400 free calls to the Information and Referral Program. Over 6000 people visit our website each month. Staff and contractors served 136 nonprofits with ongoing tech support and consulting projects focused on IT infrastructure, website development, database development and support, and technology strategy. Financial Services staff were managing the finances of 120 organizations at year end. Human Resources provided that “just-right slice” of an HR professional to 4 HR Partners and undertook 30 short-term projects, some with service corps members. We are getting more services out around our state with 99 engagements with 85 clients outside of the Seattle/King county area.

Service corps members contributed \$1.3 million worth of services. Thirty management consulting projects were done by service corps members, who also developed emergency plans for 6 King County Housing Authority projects. Service Corps members supported seventy-three organizations who participated in our cohort programs, which provide team-based leadership development and organizational planning.

### 3 RECOGNITION AND PHILANTHROPIC SUPPORT

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We won Seattle Business Week recognition as the Best Nonprofit Organization. We were also recognized twice by America’s Service Commissions for our innovative emergency planning program and the Executive Service Corps, which grew by 35 members. Service Corps and Volunteer Manager Corps members contributed \$1.3 million in volunteer time.

We were able to successfully transition a technology assessment and planning program, called Plan IT! that was started with support from AmeriCorps, Points of Light, and Google, to continuing Microsoft support. We raised more than \$2 million in philanthropic support, including a three year grant of \$1.5 million (\$500,000 for 3 years.)

### 4 WHAT’S NEXT

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- **A new organizational assessment tool** – we are developing and piloting a new organizational self-assessment tool to take the place of the SVP Organizational Assessment. This will be available to any ESC that would like to use it.
- 501 Commons is launching a campaign called “**ZaptheGap**” to close the gap between our nonprofit and business sectors in access to technology. Most nonprofits are operating without the up-to-date equipment, software, systems and services and many funders will not provide support for technology. We want to change this in Washington.



## Points of Pride

The Executive Service Corps of the Lehigh Valley, PA is out of business. From its beginnings on 3/18/1995 to its official termination on 3/18/2015, ESCLV served in a limited market of nonprofit organizations. ESCLV's area of operations consisted of approximately 1200 nonprofits spread over 2 full counties and small portions of 2 others. Just over half of those nonprofits were considered to be within the scope of the ESCLV services.

For the first 7 years of its existence, ESCLV conducted business with a strictly 'volunteer' model. There was no paid staff (fulltime or part time) during that time. During that period the 'volunteers' were responsible for a total of 27 client assignments. In fact from 2000 through 2003 there were no client projects fulfilled. By the end of 2003 the board had determined that the ESC business should be terminated.

Through mutual associates and the quirks of time I was approached to determine my interest in acting as a part-time director. Circumstances being what they were (I was coming off the conclusion of a three-year research grant) I was interested in accepting the position. It included a modest salary.

I immediately understood the underlying opportunities of the ESC model. Having accomplished a number of research projects over the years with nonprofits in the Lehigh Valley area I did not lack the knowledge of potential client projects. As can be imagined attempting to right a listing ship, part-time became full-time in short order. We began immediately to reach interested clients and for several years maintained a modest growth for an all too brief period of time.

During the second 10 year period of ESCLV's operations (actually 7 of them could be considered productive) the ability to secure contracts diminished all too quickly. In fact in the last 24 months of my employment ESCLV accomplished only 5 client projects. And in a quirk of fate I was reduced to acting as a 'volunteer'.

In the Fall of 2014 the ESCLV board voted to close down operations effective December 31, 2014. The actual termination date as far as the state of Pennsylvania requirements were concerned was determined to be March 18, 2015, exactly 20 years after its inception. I appreciate tidiness.

At this time, in preparing for our forthcoming national conference, affiliate members were asked to present a description of their "Points of Pride" to be included in the conference book. I didn't feel that I had any to share so I planned to pass. Our colleague Trudy Smith encouraged me to write about the positive accomplishments achieved by my time with ESCLV. In reflection I can say that our efforts to assist area nonprofits to identify the health of their organizations and improve their shortcomings were nothing short of marvelous. And the part that I played in that endeavor fills me with personal and professional pride. This truly was a perfect end to my professional career and I can say that the experience was one of the highlights of my life.

Notable Points of Pride:

- During my tenure we performed over 175 projects and engaged over 80+ volunteer consultants. Forced by circumstances we opted to aspire to the highest "quality over quantity". And in that we were very successful.
- ESCLV was engaged with a veritable smorgasbord of nonprofit organizations, from social services, education entities, religious groups, medical services, to long established activities and from the ground-up startups (if I ever see another IRS Form 1023 in my life it will be too soon).
- I was consistently humbled by the unquestionable loyalty of my volunteer consultants; their persisting with the projects to their conclusion, and most importantly the absolutely highest level of competence and quality of the reports provided to the client.
- In summation, the ESCLV's management consulting effectiveness in our community was by most standards far too short, but extremely long on quality and positive feedback.

For those points and more I was proud and very pleased to have had the opportunity to be associated with the ESCLV affiliate and its accomplishments.



## Executive Service Corps of Houston 2014 Points of Pride

- Hosted successful **30<sup>th</sup> Anniversary Celebration with Paul Hobby, Chairman, Greater Houston Partnership**. (Paul's father, Bill, was the Lt. Governor of Texas; Bill's mother, Oveta Hobby, was the first female Sec. of State for US, Hobby Airport, Hobby Center) ; guests included **Neil Bush**, chairman of the **Barbara Bush Houston Literacy Foundation, Points of Light Foundation**, son and brother of George H.W. Bush (41) and George Bush (43) who will speak on literacy at 2015 Leading Edge Luncheon
- **Scanned all project information** allowing for easier group access; utilizing **Dropbox** and **GoToMeeting** to ease the 6-county distance
- **Organized history of ESCH**, scrapbook creation – staff driven
- **Created 2 Videos (pro bono)** through John & Laura Arnold Foundation, The Giving Library (now Great Nonprofits), and Gavin Chin, son of Board Chairman, posted on Vimeo
- Improved Board Advisory Council (2013-14) and term limits
- **Diversified Board of Trustees** to include currently working women and men of various ethnicities ties and skillsets to better reflect the nonprofit community we serve
- **Significant Projects** included United Way Montgomery County (evaluation training, collaboration, transportation), United Way Baytown and Chambers County and began discussion with Bayer Nonprofit Management Center (ESC-Pittsburgh), Texas Railroading Heritage Society (moving 16 railroad cars out of downtown Houston to Richmond, Texas), Jamie's Hope (Cancer group)
- **Nonprofit Startup Meetups**– Weekly Sessions (Tues., 11 a.m. – 1 p.m.)  
ESCH offers basic training and conversations with consultants regarding establishing effective organizations, guidance on the nonprofit landscape and heads them in the direction of appropriate business planning, fundraising, etc. No fees for each session, but Business Plans and assistance for completing the IRS1023 and IRS1023EZ are charged. Established 3 nonprofits including Kids' Reading Room
- **FUNdraising Meetups** – Monthly free lunch & learn sessions (4<sup>th</sup> Fridays)  
ESCH offers brief PowerPoints and conversations about creating development plans, basic fundraising messages
- **Consultant/Board Relations Improvement** - Currently have recruited through Volunteer Match, Volunteer Houston, LinkedIn Board Connect, and trained 80 consultants; trainings and consultant relations stabilized with more routine trainings (quarterly) and HR Professionals engaged

- **Ongoing Partnership with University of Houston C.T. Bauer School of Business – MIS Program**  
Each semester 15-20 websites, databases, SEO or software issues are addressed with aid of senior students, mentored & np jobs scoped by business professionals, now led by global IT consultants
- **ICloud Computing/Technical Assessment** - In 2015, ESCH has created a brochure touting a fledgling program to help assess technical needs (hardware/software analysis) to help small to mid-sized nonprofits to the cloud. (First client: Asian Chamber of Commerce and in conversation with Houston Arts Alliance)
- **Strengthening Consultant Networking Skills** - Consultants are encouraged to contact past clients regularly and to attend Greater Houston Partnership meetings, Chamber of Commerce, Association of Fundraising Professionals
- **ESCH is in process of adding another wealthy neighboring county – Ft. Bend –** to garner more clients by co-hosting monthly np management seminars with the Ft. Bend Chamber of Commerce



**Executive Service Corps**  
*Strengthening the nonprofit community*

*New Hampshire  
+ Northern New England*

1. Increased fees for larger nonprofits (Annual budgets of \$750K to \$5M)
  - Comprehensive strategic plan – fees up to \$9,500
  - Hourly fees up to \$40 - \$60 per hour
2. Utilizing more ESC consultants on internal projects/operations
  - Book keeping
  - ESC Newsletter
  - Training
3. Invited to speak at NH Governors Conference and various NGO Programs through the US State Dept. and World Affairs Council of NH
  - More networking and “getting out there”
4. Recruited 9 new consultants
  - Capitalizing on all key regional volunteer websites
  - Utilizing “proactive” interviewing/selling approaches