

Points of Pride

NESC

National Executive Service Corps, founded in 1977, has completed over 2,000 consulting projects for 1,200 nonprofits of all sizes in the New York, New Jersey and Connecticut tristate area.

What Makes Us Different

- We start by studying the client's mission, vision and values, then move forward in collaboration between their staff and our Consultants.
- Our Consultants are seasoned professionals with expertise in a variety of disciplines such as finance, marketing, operations, board development. They are dedicated to giving back to their communities and have chosen to donate their time to help nonprofits achieve their missions.
- The NESC consultants' experience are matched to the needs of the unique project.
- The NESC team develops recommendations custom tailored to the client's goals. The client will receive a final report that is a living document, created specifically for the organization.
- As a nonprofit, we share the client's values, and provide expert services at a small cost.
- Many of our clients hire us again and again as they grow and change. We pride ourselves on longstanding relationships with many of the region's leading nonprofits.

Case Study: Arts Organization – Strategic Plan

A local arts organization was asked by their funder to develop a strategic plan to grow the organization. Since this was the organization's first endeavor in creating a strategic plan, they enlisted the guidance of NESC for the process.

Initially, NESC interviewed the staff, board, and key stakeholders to understand the organization's core competencies and areas of improvement. Then, a competitive analysis was conducted of other similar organizations to understand their boards, financials, funders, programs, and other key metrics.

Secondly, a Planning Committee was formed of key staff and board members. The first issue tackled by the committee was the organization's mission. It was immediately apparent that the staff wanted different wording on the mission than the artistic side of the organization. One staff member was actually spending time on a part of the mission that had become less relevant over the years. Because of that meeting, the organization developed a unified vision, and the staff is focusing more time on what is really important to the mission.

NESC also assisted the Committee with developing goals, identifying the three most important initiatives and steps to accomplishing those goals with a timetable for completion.

As a result, the organization:

- Increased the number of board members and added board members with key skills that enabled them to grow their programs.
- Initiated a “Give-Get” goal which enabled them to raise more money.
- Increased revenue. By looking at what other organizations were charging for their programs, they decided to increase the price of their programs
- Now has a plan for growing the organization over the next three years.

We organize Roundtables – for example – Tips for Finding the Right Nonprofit Executive Director

- Organize the Search
- Determine who “owns the process” — often a Board-appointed committee, sometimes including non-Board experts.
- Determine who will do the work — the search committee or an external executive search firm.
- Define the committee’s authority — how and when should the full Board be involved.
- Research and Candidate Development
- Develop the position specification – reflecting required experience, competencies, personal attributes, significant issues to be addressed and compensation range.
- Identify potential candidates – through multiple means (research, networking, and advertising).
- Develop a “long list” of preliminary candidates – who satisfy appropriateness criteria and are available and interested.
- Comparatively evaluate the “long list” – using a matrix of relevant criteria including skills, experience, and personal characteristics.
- Prioritize and identify a “short list” of candidates best suited to the position.
- Conduct in-depth interviews with short list.
- Identify the preferred candidate and a strong back up. Check references – including peers, subordinates and superiors.
- Negotiate compensation.
- Gain Board approval and make the final offer.
- It is a critical Board responsibility to hire, support and evaluate the Executive Director. Don’t rush the process. Organize to search thoughtfully; develop a thorough list of qualified candidates; and invest time in selecting the right candidate for your organization. Tomorrow’s success depends on the leadership decisions of today.

Case Study: Food Bank for Westchester — Board Development

Started in 1988 with one man and a van, the Food Bank for Westchester (FB4W) has grown to be the supply and support center for 227 front line hunger relief programs

throughout the county. The organization collects, warehouses, and distributes 10 to 12 tons of food a day, providing 95 percent of the food that front line centers distribute. FB4W planned to move to a new refrigerated warehouse that would triple its capacity. Knowing this growth would present opportunities for the organization, it wanted to strengthen its board of directors to be prepared to maximize these opportunities. FB4W engaged NESIC to work with the board and the executive director to adopt best practices and enhance working relationships. A critical first step was a self-assessment survey that helped board members analyze and articulate the challenges they faced, understand their roles, and build a foundation for communicating in the future. Next, NESIC facilitated a retreat during which the board and executive director developed a new committee structure, clarified responsibilities, identified priorities, and produced an action plan. Three months later, FB4W moved into its new space with the support of an energized and engaged board, enthusiastic about the opportunities ahead.

NESIC has a sector named Social Enterprise

How can a nonprofit that relies on traditional sources of philanthropic funding transition into developing social enterprises that are attractive to impact investors in terms of the returns it produces and the impact metrics it develops and reports? The answer is: Social Enterprise and Social Impact Investing.

This is the pursuit of unrestricted cash flow through leveraging and/or monetizing existing assets.

This new source of revenue developed from existing assets is becoming more valuable, when monetary contributions from endowments, government grants and foundations are on a decline.

Case Study: Western Connecticut Youth Orchestra — Organization

For many years, the Western Connecticut Youth Orchestra operated as The Ridgefield Symphony Youth Orchestra, an arm of the Ridgefield Symphony, offering youngsters, through high school ages, a chance to receive quality orchestral training and to perform publicly. Increasingly, however, the Youth Orchestra began operating independently, ultimately concluding that it should separate completely from The Ridgefield Symphony. To help it navigate this process, it turned to NESIC.

The NESIC team served as a kind of midwife for the youth orchestra's rebirth as an independent organization. First the team interviewed the group's key board members and sent a questionnaire to the full board and all officers to solicit their views on the priorities and operations. Then the NESIC team attended and led the group's initial board meetings, helping streamline the agendas, set priorities and organize committees. With this NESIC guidance, the board elected a new chairman, appointed an executive director, adopted a vision statement and by-laws, and crafted a new logo and new name — The Western Connecticut Youth Orchestra.

Case Study: Bergen County — Municipal Shared Services

Bergen County, New Jersey, is exploring and promoting ways that municipalities may cooperate and share activities as a means of generating savings and thereby moderating residential tax burdens. NESIC was engaged for two projects concerning shared services by the Public Works Departments of municipalities within Bergen. The

first, entailing 13 municipalities in the northwest part of the County, led to the second, serving another group of 16 municipalities known as the Riverside Cooperative. In these engagements NESC consultants interviewed all municipality Borough Administrators and Superintendents of Public Works, as well as County officials. They inventoried equipment and studied similarities and differences in how public works services were delivered in each municipality. This research led to sets of specific recommendations for improving efficiencies and reducing costs through the use of shared services and the sharing of other costs, as well as recommendations for additional studies on the feasibility of a number of other possible actions.

Case Study: Outreach Project — Branding & Marketing

Outreach Project, which has been providing drug and alcohol services in the NY metropolitan area since 1980, stands out as a leader in the provision of adolescent residential services, services for women and children, and treatment services for diverse populations. It also operates the largest Credentialed Alcoholism and Substance Abuse Counselor (CASAC) Diploma training program in New York State.

Despite its great success Outreach Project felt the need to increase its visibility in the markets it serves. Outreach management asked NESC to help in the development of a branding and marketing effort.

NESC, in conjunction with Outreach Project's management, put in place a branding process which was able to capture the essence of Outreach and define it in a clear and concise statement. This message was translated to a tag-line that describes the benefits Outreach offers and, just as importantly, a tag-line which staff and other key stakeholders can relate to and be motivated by... Reaching Out to Build Healthy Lives. The tag line was integrated with a new logo.

This package has been factored into a marketing action plan that aims at maximizing Outreach Project's staff and client base in selling its services to clearly defined target audiences, with Outreach's website reflecting the "new look" and fully supporting its business development activities. The branding process will be coordinated with the development of a marketing/sales plan. This will include defining Outreach's target markets and outlining approaches for reaching these markets.

As part of the marketing initiative, Outreach Project wants to capitalize on its management staff in selling its services by training and motivating them. This will require outlining and developing a tailored sales training program with the NESC consultant(s) implementing the training for the managers.

Case Study: MDRC — Risk Assessment

MDRC, created in 1974 by the Ford Foundation and a group of Federal agencies, is best known for mounting large-scale evaluations of real-world policies and programs targeted to low-income people. The organization has also worked with others to design and evaluate such research programs. MDRC's board audit committee requested an outside assessment of the firm's corporate-level risk. Management selected NESC to perform this assessment.

NESC assembled a team of consultants with technical expertise in risk assessment. The group interviewed 21 senior- and mid-level MDRC employees, and evaluated external environmental factors. NESC delivered a report that identified and quantified

risk at two levels — operational risks and strategic risks — and offered recommendations to more effectively deal with risk in each instance.

Case Study: Connecticut Humanities Council — Operations Review

The Connecticut Humanities Council (CHC) embarked upon a year-long environmental scan to evaluate the CHC's heritage grant-making effectiveness. The scan identified three areas of greatest challenge facing heritage organizations today: the necessity to understand the changing interests of new audiences, the necessity to create and support effective leadership, and the necessity to improve financial stability. The CHC then overhauled and re-shaped its traditional granting programs in the following year into two granting strands: organizational effectiveness (inward looking) and community impact (outwardly focused).

Next, the Council created a Heritage Resource Center and Field Services Program that gives museum directors, staff and board members access to resources that help them adapt and respond to the unprecedented challenges facing organizations of every size today. Visitors to the HRC website find reviews of new books and articles, recommendations on the most useful websites and blogs, and special reports, surveys and audience studies. As part of its field services program, the CHC called upon NESAC to develop a pilot program to help small heritage organizations in Middlesex County. The NESAC team collaborated with CHC's Director of the newly created Heritage Resources Center to create and conduct a pilot Directors Roundtable Discussion series for six directors of small historical societies in Middlesex County. This series of six monthly, two-hour facilitated discussions produced an active exchange of new ideas, the most important involving ways to grow revenue and reduce expenses. According to the Director, "another important goal of the series was to promote networking and collaboration as an effective strategy to address common concerns and leverage opportunities. This was one of several important outcomes achieved from the series because the participants developed a series of concrete possibilities for future action including ideas to share staff and develop joint public programs. The group has continued to move forward with their project, has continued to meet on their own, and the CHC anticipates that group participants will be seeking future funding from CHC."

Case Study: Asia Society — Executive Search

In its sixth decade, Asia Society is an international organization dedicated to strengthening relationships and deepening understanding among the peoples of Asia and the United States. Having opened five international offices and four domestic offices and decentralized its financial systems, Asia Society found that it had outgrown the capabilities of its finance department. The organization engaged NESAC to find a new chief financial officer with experience in multi-country, multi-office operations who would raise the level of financial management and professionalism to that of other world-class global entities.

NESAC's Executive Search team researched and interviewed candidates from Southeast Asia and across the United States, presented 12 to the client, and participated in eight candidate interviews with senior management. From this group three finalists were chosen, who then met with the president and board members. One was selected for the position. NESAC helped negotiate the final contract.

ESC Bayer Center for Nonprofit Management@RMU (Pittsburgh region)

1. Established the Covestro Institute for Engagement – a partnership with Covestro LLC to build deeper relationships between corporations & nonprofits through skilled volunteering – professional skills, and board service. (www.cie-bcnm.org)
2. Further Diversified job descriptions for ESC volunteers :
 - Consultants on projects guided by a contract lasting (on average) three to six months
 - Board Retreat Facilitators for BoardsWork!
 - Class instructors for educational sessions provided to nonprofit staff and volunteers
 - Project advisors for teams of corporate employees delivering Skills-Based Volunteer projects for nonprofits
 - Coaches for nonprofit staff
3. Recruited 20 new volunteers (increased team by 1/3) – mostly working professionals (some semi-retired, some nonprofit leaders) – We are in growth mode!
4. **New Research** : The Bayer Center for Nonprofit Management @ RMU is developing new research on retirement of nonprofit leaders, the impact on nonprofits, the sector & impact on individuals retiring.
5. Fun fact: sent out our 500th survey monkey survey. (mostly client work!!)
6. Trends we see in Pittsburgh:
 - a. Veterans orgs are growing fast
 - b. Emphasis on social impact measurements
 - c. Less demand for our hands on tech assistance
 - d. Working volunteers turn over faster...

Added a ¼ time staff person overseeing strategic planning and custom training contracts.

ESC Cincinnati

- 10,000 total hours of consulting, coaching and training.
- \$2,000,000 estimated market value of 2015 ESCC services
- 95 nonprofit leaders participated in ESCC Leadership programs
- 53 Agencies represented in leadership development programs
- Broad range of services (35% business solutions, 30% leadership development, 27% strategic planning ,and 8% board development)

Robert Schrage, CEO

ESC Central Oklahoma

1. We have a 20 year history of meaningful service to over 100 nonprofit organizations in our community, many of which have had multiple engagements.
 2. A recent survey by graduate students and faculty at Oklahoma City University revealed that of 38 nonprofits interviewed, all indicated they would recommend ESCCO to other organizations. Thirty said they would do so “enthusiastically.”
 3. ESCCO is well-regarded by our foundation partners, to the extent that we have recently been tasked by them with finding ways to eliminate duplicate services, merge similar organizations, and graft worthy programs to existing nonprofits.
 4. We have developed, tested, and implemented new services, including CEO Coaching, Organizational Focus Workshops, and Organizational Change.
 5. ESCCO successfully operates as a model of what it teaches, with a clear mission and goals, proper governance, and appropriate Board and staff execution of duties.
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ESC Houston

1. Collaboration with University of Houston Bauer College of Business -Management Information Systems projects done by student teams for ESCH clients, mentored by an ESCH consultant. Number of projects has increased from 24 in 2013 to 39 in 2014 to 52 in 2015 and 70 estimated for 2016.
2. Projects with Harris County Children's Protective Services - Performance Evaluation System for the Agency and Strategic Plan for one of their programs.
3. Introduced Cloud Computing as a consulting offering and started seminars for different interested groups.

4. Nonprofit Startup Program - Weekly open house for those interested in starting a nonprofit. Averaged about 100 attendees a year. This has led to 10 - 12 Business Plan projects a year and 3 - 4 assistance with IRS filings a year.
5. Partnering with Ft. Bend County Chamber of Commerce and the George Foundation to bring ESCH services to nonprofits in Ft. Bend County.
6. Completed our first electronic (virtual) Strategic Planning project with a nonprofit in Austin, TX.

Burt Hering, Executive Director

ESC Southern California

1. **Service Log** – We track our consultants’ service hours on a monthly basis. They log all ESC-related activities from consultant meetings, commute times, recognition events, phone conferences, etc. In 2015, our consultants logged over 7,100 hours, resulting in \$1.6M worth of in-kind revenue.
2. **Evaluation Project** – We have been conducting an intensive internal evaluation of our customized projects within two to six months of a project ending. In our most recent evaluation completed in June 2016, we were able to evaluate 27 projects. When we first piloted these evaluations in 2015, we were only able to evaluate 10 projects. Our goal is to reach 100% of our projects within the given time span.
3. **Salesforce implementation** – After a year of research, we have identified Salesforce as the best-fit database for our needs. We elicited the support of 501commons to help design and implement Salesforce. We have completed Phase I of the launch, focused on fund development. We are currently in Phase II, focused on client and project management.
4. **Collaborative projects** – This year, we have started collaborating more closely with our funders who want a more “deep-touch” approach to their grantmaking. Using our custom cohort model, we have been able to work with funders to create cohorts of grantees who receive customized training and consulting services based on the interests of the funder.
5. **Match meetings** – With the support of our ESC consultants, we have updated the process for matching consultants to projects. By integrating the coaches earlier on in the process, we have found that the match meetings are more streamlined, efficient and effective for our coaching model.

6. **ESC branding** – We have refreshed our collateral materials. The changes were small but have had tremendous impact, e.g., the new services brochure with the pencil graphic has become a great resource and marketing tool for our organization.
7. **Social media** – We hired a Development & Communications Coordinator in early 2016. Since then, we've been able to engage our community on Twitter, Facebook, LinkedIn and now YouTube where you'll find video testimonials of our clients. It has been a great tool to stay connected in our nonprofit community.
8. **Consultant engagement** – In response to the increasing sophistication of our clients, we have increased our efforts to engage and support our volunteer consultants. In 2015, we hired a Program & Client Coordinator who conducts regular check-ins with our consultants throughout the duration of each project. It is a more proactive approach to managing our projects and volunteers. Additionally, we have updated the biographies of our consultants, highlighting key skills and achievements to share with their fellow consultants and client organizations.