ESC-US Conference Notes – Day One

Optimizing Later Life: The Power of Engagement – Jacquelyn James Ph.D.

Second stream of work concept – what she does for pay vs what she does for love – tapping later life potential, the power of engagement – growing older is not what it once was – we are among a culture that is still not sure what to expect and how to interface – 15-20 years has been added to the life span – older adults are healthier than ever before – 72,000 100+ now, to grow to 600,000 by 2050 – economy has affected plans of the retirement-eligible – "wellderly" people – paradigm of disengagement, shrinking one's circle, activities, life pattern – most deeply ingrained and socially sanctioned prejudice against the old: ageism – deepest age, next gender, then sexual orientation, then race – Https: implicit.harvard.edu/implicit/demo/ - a paradigm shift is needed, enhanced by lifestyle improvements which can delay the onset of disease and disability and increase quality of life – at ages 50-55 –

What if we saw aging as an opportunity rather than a problem? Boston College Exemplar Study of Encore.org Fellows – nomination process to identify highly successful fellows and common factors in this level of success – made good matches, integrated fellows into the fabric and culture, listened and learned together in 90-day onboarding processes, both sides open to new ideas, fellows given a high degree of independence, fellows were seen as highly professional, impactful, and constructive. The fellows life stage was seen as highly important in their success. Engage – Connect – Enrich. It is not just about engagement but the quality of it. Something that lights up your life, transforms you – when you find the sweet spot: you are great at it, you love it, the world needs it, you are paid for it – passion, mission, profession, vocation intersect – slows age-related functional and cognitive decline, prevents over dependence on families, etc. – None are so old as those who have outlived enthusiasm. – Thoreau

Significant discussion followed about how this information can help us as affiliates. Could ESC's play a role in processing older volunteers into the nonprofit world, not necessarily as ESC consultants? (LA says they are giving their consultants thousands of dollars worth of training. What does that consist of?)

ESC-US Conference Notes – Day Two

The M Word – Part One

Paul shared how ESCCO is involved in merger conversations through Nonprofit Structural Change.

Trudy – Sarasota Community Foundation material, perhaps on ESC-US website, called To Merge or Not To Merge – each entity pays half their fee – recruited for-profit merger consultants – David LaPiana materials.

Ulea – Three types this year – Client needed to merge, approached by one, ESC evaluated multiple partners, signed this week. Two similar organizations with some geographic overlap and much program overlap, both Boys and Girls Clubs, have not yet gotten it to move, both ED's want it but does not have deeper support, came to ESC through an RFP. Client wanted to take over a smaller NFP, smaller was okay, but wanted to know how to do it, smaller concerned with mission preservation. Legal aspects of concern to some. May not require legal due diligence but should have legal review, watch for conflicts of interest, etc. MOU/merger agreements can be very basic, may or may not need attorney review, draft it and have each's attorney look at it. They are paid by one entity, $9000 and $15000 on these.

Boston Foundation had set up a 3 year program to fund mergers at the due diligence phase but canceled it due to a lack of interest, several million dollars.

Don't try to be an attorney. Bill asked about post-merger issues (son does that for BCG) and cultural impact, which is significant. Communication plan, internal and external. Informing funders, especially those who fund both. Julie offers follow-on as a separate contract. Mergers where one is in the red are a big challenge. Nonprofit Sustainability Initiative of 13 largest funders in LA is funding merger explorations using consultants, paying $25-30,000 for consultants.

The M Word – Part Two

Craig described Cincinnati's process. They merged with a similar size organization that had no overlap. They took about a year. There is still work to be done as far as branding etc. Their hope is that they can together become more of a one stop shop for nonprofits to have a variety of needs met. They combined boards.

Susan told how the merger with Bayer Center at Robert Morris University had worked; she was not there but Yvonne is available with more info. Their funder told them the funding would be going away. The folks who came with ESC have gradually transitioned out but they do have their own identity within Bayer. They use a lot of trainers, some of whom are not considered ESC volunteers. They also have corporate teams come in to work specific projects for their clients. The Center is not located on the university campus but gets IT support, HR, etc. from the University. They get help with marketing but their messages are limited. Their website is very outdated but they do not have freedom to change it. They do not have their own board, just an advisory board. The university could fire their E.D. The E.D. does not get to do fundraising; that is all under the University's control for fundraising; thus, the Center is a financial liability to the University. Their advice is to put such things in writing (term sheet) on the front end. LaSalle embedded organization handles their foundation grants as "contracts for services." They do get work study students. Some organizations are sharing staff positions.

Carol is ESC within the United Way. The connection came through their volunteer center, and she oversaw both. She is also responsible for community impact. Their ESC actually serves three different UW territories. In their area it was important to agencies that UW not know that they are getting help, so it is kept confidential. The agencies really need the help but the ED's don't necessarily want to admit it. Boards only know what ED's tell them. Questioning whether they should market to E.D. or Board President. Sees great potential for us to market our services to the funders. Funders are interested in the impact of their gift. Results-based accountability is a trending thing among funders. ESC should market to United Ways and funders. ESC's could facilitate community conversations about things like the opioid epidemic. ESC within UW challenged by UW desire to see all the branding, logos etc be UW-centric. UW Board and allocations volunteers are pushing agencies to use ESC services. They do charge minimal fees for their services to build engagement. Has thousands of volunteers but only six ESC consultants. Meet monthly with their consultants. One consultant is marketing ESC to agencies. She has an RSVP director working for her.

Kathy is part of Impact Broward, which utilizes 700 volunteers. They are getting out from under the restrictions of the RSVP system, which will allow them to charge for services.

Deborah is seeing a Thrive Together model used by United Way. Donna mentioned CollectiveImpactForum.org. Trudy has seen their UW go to collective impact without really engaging the agencies, and it created a lot of bad feelings.

Most of the ESC's have been approached about the prospect of merger.

Building Our Culture of Sharing – Ulea

What can we share? How do we build a culture of sharing?

Topics: Expertise
- Ulea has an expert on Sales Force – not that busy – how could he help
- They have library experience, NESC does not and turned a project down

Social media contact
- Templates exist but hard to share on ESC-US website

Tools

Programs
- David's coaching program for a group of rabbis

Funders and ideas
- Entities like State Street and BoA

Group added
- Job descriptions
- Collaborative consultant teams with someone coming in virtual
- Coaching each other – peer, virtual, us or E.D. being coached by someone else's Consultant
- Business models – sharing what ours are
- Best practices
- Trudy's Build a Better Board program – but she needs to collect a fee
- Pricing models – methodology for setting prices
- Failures
- Extending ESC affiliates – Trudy has a startup kit
- Regulatory trends – New York State does it first – Albany used a lawyer
- Boston would like to see case studies to show impact – has a half-dozen on new site – Bayer has six also – should we have
- Evaluation processes
- Clients with locations within various ESC territories
- Marketing messaging
- Business development

Reasons why we may not share: Time, concerns about quality standards being maintained, giving vs getting, standards, resources

We broke into four small groups to brainstorm on building our culture of sharing. Here are the suggestions:

Ideal state/vision: Everything each affiliate does is available to all the affiliates.

Comprehensive contact list by affiliate with E.D. permission – Trudy to work on this

Document repository –Stick with ESC website or change? Options on how to enter docs etc.? Triangle is using WordPress – SoCal has people who could help adapt this to current site, setting up format – Vicky to work on this
Email/list-serve with ground rules – Messenger? Base Camp? Linked In? – Ulea will talk to Irving
ESC Liaison from each affiliate – Paul to work on this
Network-wide org chart – Anne to work on this
Expertise map – which affiliates have done what, well
Collaboration reports – when two affiliates work on something together, post it
Test sharing of consultants on projects – test one – not identified at this time but open to it
Common national standards for coaching etc.
Memorandum of Understanding update
Funder research that could lead to national funding or funding for all affiliates – Board to work on this
Coaching each other's senior people – Trudy will work on this through one of her intake people

Open to using each other's blogs, newsletters etc. and making them our own – get on each other's email distribution lists, ask if it's okay to use it or operate with general permission – we should link the persons who do social media at each affiliate – schedule a conference call (peer call? practice call? re social media/newsletters

Linked-in recently sent out a really good training program – per Deborah at NESC.

Illustrating Impact

Satisfaction – happy clients, happy consultants, funders, clients of clients?
Outputs – report, process… numbers or deliverables
Outcomes – meet the expectations of the contract. Change happens.
Impact – direct/indirect
Motivating the client to accomplish the project is part of the plan?
Are we expected to have an impact? By whom?
Yes, clients, consultants, funders…
Boston and Los Angeles contract for coaching for implementation or some kind of implementation support, also Boston can offer a fellow…

Who answers with an indirect outcome? We can talk about lives touched. Boston gives an output of community hours, but counting the lives impacted by those organizations feels very astronomical.

We discount our impact because we want to show the impact of the impact, because human service groups have a better story, because funders like it better.
Consultants who sign up want to see those impacts of impacts – that's why they sign up.

We can talk about numbers and areas served if funders ask about areas of impact. Paul says we're helping to build strong infrastructure in our nonprofit community.

Paul: should we talk more about our direct impact than our indirect impact? If so, what kind of data are you gathering…
Is it practices? Could we be asking are you a better manager, leadership growth? Southern California is working on redesigning questions to get more on impact. To get that data, the interviews are going to take longer and we may not have clients willing to take the time to get those.

Is direct impact changed practices or is that outputs? Is that time based? Longer time frame? Some time frames may be very long – e.g. a 3-5 year strategic plan. It takes resources to keep in touch and see what they're doing all during that time. Deep impact may be at least 2-3 years out. Case studies that are strongest are a couple of years out. 6 months out we're "standing on fuzz" is "Level 3 impact" – what level of impact are the funders looking for?

If the client gives a story about what they could do directly as a result of us, we can claim it. "Improved results based on client feedback".

Darlyne – what role do quantitative measures have? Funders want to know what "better" is – it needs to have some sort of objectiveness. This may not need to be up front – you can define down the road on what that means.

Some clients aren't particularly interested in connecting with us after we're done, even a few months after – they have gone back to work.

You have to ask why when you're contracting so that you can fulfill expectations around why you were brought in.
Two questions from the fellows program: "What's the evidence of impact today?" "Will the impact endure a year or more?"
Then maybe at 12, 18 months – follow up. Is that true?What's been going on?

Who has language when people ask "What is your impact?Why do you exist?":
Do good on the inside so that they can do good on the outside – be more competent so they can be more effective
Also, matching skills and talents with the needs of the community

What if we quantified the value of the skills that our volunteers keep in the workforce? What are we keeping in the economy that otherwise would have been lost? And saving taxpayer dollars….

It moves away from eval of the consultant to eval of the project/impact…..

<u>Points of Pride – see handout</u>

Kathy did not submit one but has gotten everyone on board to move to fee for service.

Carol had consultants operate the ESC for the time being during a UW transition.

ESCSC had one not on POP list, a Triangle client moved to SC and is running a client agency there.

NESC moved offices, saved 12k per month. Gala coming in at twice the expected income. Rebranded and improved website. Doing round tables for Board chairs. Does a lot of executive search and public school projects. Half their business is religious organizations.

ESC-US Conference Notes – Day Three

<u>How Encore Fellowships Compliment Consulting</u> (insert power point from Jim here)
<u>Marketing and Identity: How to Deliver Increase Value to Nonprofits</u> (insert notes from Marjorie here)