



501 Commons, including the Executive Service Corps of Washington

1 SELF-ASSESSMENT AND PATHWAYS

The [Five Elements Self-assessment](#) tool (available to your community for free on our website) and the accompanying Pathways consultation have been very well received. We have had a local foundation pay for Pathways for 15 of their grantees. Organizations get 30 hours of consultation as well as the focused recommendations that are sent to everyone taking the self-assessment. **Consider directing your clients to the tool and offering a Pathways consultation as well.** Contact Jan@501commons.org to learn more. .

2 HR SERVICES & CLIMATE SURVEY CONTINUES TO GROW

Our HR practice, which continued to grow rapidly this year. Revenues grew rapidly this year. This comes from a combination of projects done by service corps members, ongoing services to our “HR Partner” clients delivered by staff and contractors, and climate survey clients.

If you have clients interested in a staff/climate survey, please contact us. We have a survey customized to nonprofits that provides a great tool to help managers understand the perceptions of staff. We will administer the survey and produce the report for you to deliver and you can provide consultative services to help the organization take action on the results.

3 LEARNING CONNECTIONS

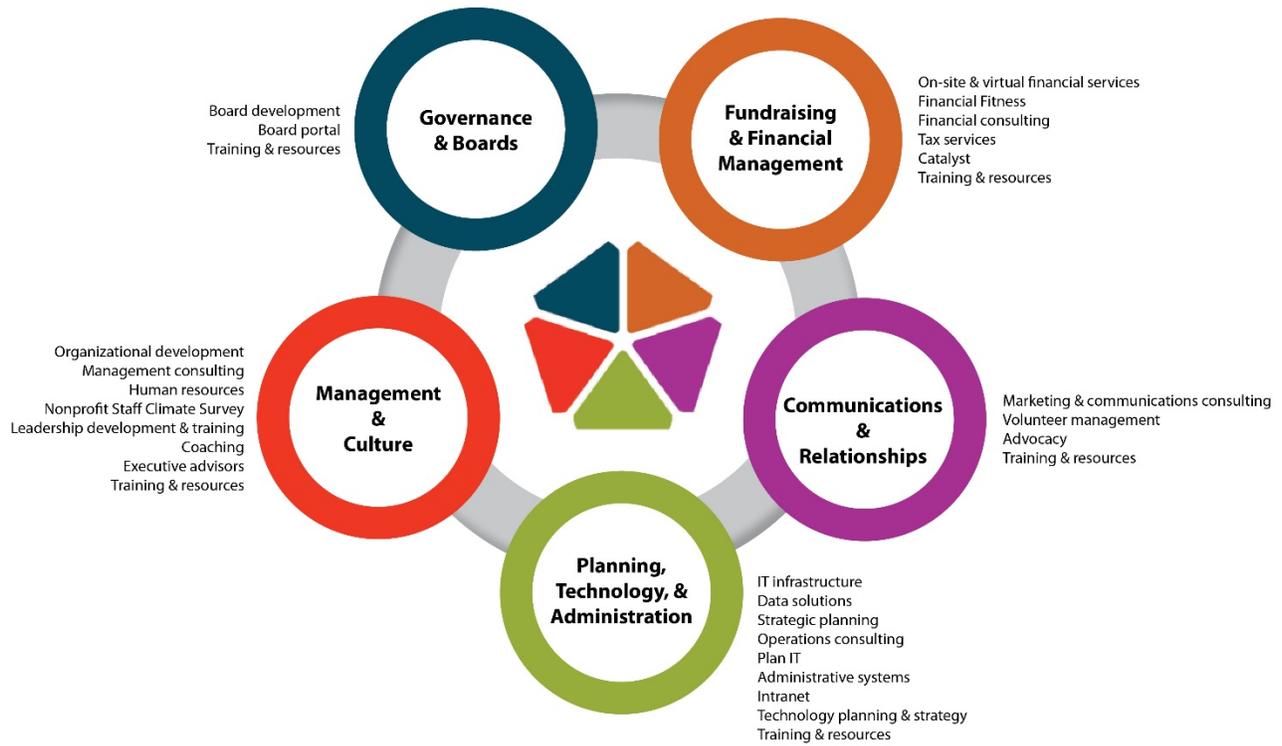
We recently launched [Learning Connections](#), a new online resource that connects nonprofit employees and those who want a career in the nonprofit sector with trainings, leadership resources, nonprofit career information, and other tools. Learning Connections includes:

1. [Learning Connections Catalog](#) – An online database of training/workshops leadership programs, nonprofit degree options, and professional development resources across Washington (trainers and consultants can [submit their listings](#) through our easy-to-use online forms at no cost).
2. [Career Resources](#) – Job research and advice on entering or advancing in a nonprofit career.
3. [Leadership Development](#) and [Research](#) – Brush up on the latest research and explore resources to help you build your leadership skills.
4. Advice for [Employers](#) and [Trainers](#) supporting the development of the nonprofit workforce.

3 SERVICES OFFERED BY 501 COMMONS

In 2017 we provided services to 700 organizations totaling 1200 engagements in the following areas:

Our Services



More info: Kerry Kozuki kerry@501commons.org



2018 ESC-US National Conference ESC of the Triangle Points of Pride

Board Leadership Boot Camp Continues to Grow in Popularity

Our Board Leadership Boot Camp, a collaborative offering funded by the Blue Cross and Blue Shield of North Carolina Foundation and the Triangle Community Foundation, was oversubscribed once again this year. Twice a year, 25 nonprofits (up from 15 last year) send two board members to six two-hour sessions.

- Dimensions of Nonprofit Leadership
- The Effective Board
- Better Board Meetings
- The Board’s Role in Agency Fundraising
- Financial Leadership
- Nonprofit Sustainability

All agencies that complete the Boot Camp are eligible two hours of free consulting from ESC to work on a goal to improve how their board functions.

Piloting Workshop Series for Nonprofit Staff and Board

We are piloting educational workshops tailored to the specific needs of nonprofit staff and board leadership. Each workshop is led by an ESC consultant. This resulted in new nonprofits who had not yet done a project with ESC in the past. Each attendee is charged \$50 using the web platform Brown Paper Tickets.

	<u>Number of Attendees</u>	<u>Nonprofits New to ESC</u>
Grant Writing 101	60	35
Finances and Budgeting	42	28
Supervision 101	55	17
Fundraising 101	38	25
Fun with Logic Models	6	2
Marketing 501	44	20

Building Our Salesforce Capabilities

We secured pro bono Salesforce support from Blue Cross and Blue Shield of North Carolina, which resulted in a saving of \$7,000. In the past, we stored all project data in Salesforce. One important addition to project data that we are now capturing are the results from our three-month follow-ups. Another important addition to Salesforce is that we are now able to capture all Boot Camp and workshop attendees in Salesforce. Therefore, we can now look up a nonprofit and see if they have either done a project or participated in a workshop or Boot Camp. Also, we have linked Salesforce with Mailchimp so that Salesforce is source of all data, which has dramatically increased our efficiency.

Refined Strategic Planning Offerings to Meet the Needs of Our Clients

We now offer three levels of strategic planning options – each can be customized to fit the needs of the client.

- **Strategic Plan** is for agencies that have sufficient resources and time to create a detailed 3–5 years plan. In general, may require 6 – 9 months to complete.
- **Strategic Direction** is for agencies that need to refresh an existing strategic plan or would like an abbreviated process. In general, may require 3-6 months to complete.
- **Strategic Focus** is for agencies at a critical juncture that need to lay out a short-term strategic focus concentrated on areas for the next 6-18 months. In general, may require 1-3 months to complete. (based on Oklahoma’s Organizational Focus.)

POINTS OF PRIDE

EXECUTIVE SERVICE CORPS OF CENTRAL OKLAHOMA (ESCCO)

OCTOBER 2018

2017 was a record year in terms of the number of projects completed, double any previous year with 22.

Our copyrighted Organizational Focus Workshop has now been conducted for more than a dozen organizations, and we have created a number of options within the plan.

Clients continue to give us exceptional reviews on the quality of our work.

We have completed a successful transition in the Director of Consulting position, upon Doyle Eiler's move to Texas. We have engaged Gayle Farley, who retired after 18 years with the Oklahoma City Community Foundation, working with over 400 nonprofits.

In the next few months we will begin offering another new product, workshops conducted by some of our community's most experienced experts in the areas of board development, fiscal management, and fundraising design.

At our upcoming Fall Consultant Forum, we will begin a comprehensive program of assessment of each consultant and their level of satisfaction. Once that is completed we will begin a focused recruiting program to add additional consultants.

Our first targeted marketing plan involves 88 ideal potential clients. To date we have seen about 25% and secured commitments from about 35% of those.

Our services are being requested in other parts of the state of Oklahoma, and we intend to do our best to fulfill those requests.

CEO Paul Moore will retire in June of 2019 and our Chair and Chair-Elect are studying staffing options as we go forward.

Key Challenges: Money and staffing decisions.