



2019 CONFERENCE AGENDA

**The Interchurch Center
475 Riverside Drive, New York, NY 10015
(Whitehead Board Room)**

Cell phone contacts for Conference attendee needs:
Darlyne Koretos (513) 919-4262
Julie Crockford (857) 204-9923

Thursday September 12

12:30 to 1:00 pm Check-in (Whitehead Board Room)

NOTE: Please print your copy of the Conference packet before arriving at the meeting. We will not supply printed copies to each attendee.

1:00 to 2:00 Welcome, Introductions and Sharing

- **Welcome (Michael Towers and Darlyne Koretos)**
- **Get-to-know each other exercises (Julie Crockford facilitates)**
 - Personal – to get to know each other
 - **“Can you top this? Client tales – Dreams and Horror stories”**
Pair sharing then report out. Attendees vote for best “best” and best “worst”.

2:00 to 2:30 Where it all started: International Executive Service Corps, David Hartingh, President/CEO

- The first ESC was IESC . . . we'll hear how it has evolved and what it does today.

2:30 to 2:45 Break

2:45 to 3:15 Get-to-know our Network – Part 1, Marissa Belau, ESCSC (video feed from Los Angeles)

- **Collective Results:** Survey changes/goals, and overall information/items that touch all affiliates

3:15 to 5:00 Get-to-know our Network – Part 2, (Jody Yetzer facilitates)

- **Affiliate Profiles:** Discussion by/with each affiliate based on responses to survey and the highlights/challenges questionnaire. (10 min/affiliate + 15 min Q&A)

6:00 to 10:00 Tour Columbia U. environs, Morningside Heights and dinner

at *LeMonde*, 7:00 pm (2885 Broadway, New York, NY 10025)

Friday September 13

9:00 – 9:30 ESC-US Annual Business Meeting

- Year in review – (*Darlyne Koretos*)
- Financial report (*Michael Towers*)
- Governance (*David Factor*)
 - Election – 2019-2020 Board and Officers
 - Proposed By-Law revisions

9:30 - 10:30 Creative Collaborations – Part 1 (*Michael Towers facilitates*)

- Baruch University, *Anthony Farina*
- University of Houston, *Jim Rather, ESC Houston*

10:30 to 10:45 Break

10:45 to Noon Creative Collaborations – Part 2 – Panel

- Collaborating to utilize expertise our consultants don't have, *Julie Crockford, ESC Boston*
- Collaborations that no longer work; collaborations in development, *Jim Rather, ESC Houston*
- Collaborations with Funders, *David Factor, ESCSC*

12:00 to 1:00 Lunch on site

1:00 to 2:30 Resources/Revenue (*Darlyne Koretos facilitates*)

- What we can share with each other!

All Attendees: Please come prepared to share on these topics:

- Grants and fund development – major funders, amounts and general purpose.
- Fundraising events – What is the event (dinner, lunch, walk, bike ride, or...)? Who plans the event (board, staff, other volunteers, an event planner)? What is the net for the event? Does it bring in new donors, new consultants, and or new business?
- Earned revenue from consulting or other programs/services – more specifics than on the survey, i.e. type of project(s), approximate revenue, custom or “other” services

2:30 to 2:45 Break

2:45 to 4:00 Components of a Successful Development Program

- **Proving and Communicating Our Value, Felicity Palmer, ESCSC (via Zoom)**
- **Participant Discussion and Q&A:** What has worked; what has not? (*David Factor facilitates*)
- **Fundraising Consulting Resource** – overview of service: Creating a Fundraising Plan, *Jim Rather*

4:00 to 5:00 Workshop: Your Competition and your ESC's Difference

- Each affiliate shares: (*Jody Yetzer facilitates*)
 - Who is your competition?
 - How do you differentiate yourself and/or your unique value proposition?
 - What have you heard at the conference that you can add to your value proposition?

6-10 High-Line, Greenwich Village and dinner

at *Chow House*, 8:00 pm (181 Bleecker Street, New York, NY 10012)

Saturday September 14

9:00 to 10:30 am Parking Lot Workshop (*Julie Crockford facilitates*)

- “I heard . . . I wonder . . . I’ll try . . .” – discussions referencing all flip charts, curiosities, ideas/brainstorming to run by peers, etc.
 - Unique opportunity to use this group of peers to help/explore topics, services or approaches to take back to our home affiliates

Break 10:30 to 10:45

10:45 to 11:30 - Closing Session “To be continued . . .” (*Darlyne Koretos facilitates*)

- What else do we want to share and learn from one another?
- Ideas for how ESC-US can help – i.e. initiatives, peer learning/calls, other?
- Ideas for next year’s conference (content and structure, volunteer to host)?
- Wrap up questions, evaluation, comments

11:30 am Adjournment

**Marv Berenblum – Chairman, Advisory Council, NESC (ESC New York)**

Marv joined NESC in 2003 as President and Chief Executive Officer, and became Chairman and CEO in 2005. He now serves as Vice Chairman of the Board and Chairman of the Advisory Council. He came to NESC after 14 years with the search firm of Heidrick & Struggles, where he was Area Managing Partner. He was also Chairman of Heidrick's Quality Council, which focused on the quality of the services that were offered to clients globally.

Prior to this, Marv served as Senior Vice President for Human Resources and as a member of the Operating Committee of the media company, Knight-Ridder, Inc. In his earlier career, Marv was associated with Continental Grain Company as Senior Vice President for Human Resources and as a member of its Board of Directors. He previously was associated with Exxon and Cummins Engine Company in human resources-related assignments. Current associations include: Chairman of the Leadership Council of Highnote Foundry, Founder and Chairman of Yale Alumni College, and National Commissioner of the Anti-Defamation League to name a few!

Marv graduated from Yale University with a BA in American Studies, and received a Master's in Industrial and Labor Relations from Cornell University, where he was awarded a Teaching Fellowship with a concentration on the Bill of Rights. He also completed the Advanced Management Program at Harvard Business School. Marv is a recipient of the Yale Medal, the Yale Glee Club Medal, and the Anti-Defamation League's Daniel R. Ginsburg Humanitarian Award.

**Julie Crockford – President, Empower Success Corps (ESC Boston)**

As President – a role she sees as the opportunity of a lifetime – Julie oversees all aspects of the organization, including strategic direction, program development, operations, marketing and communications, and fundraising.

Prior to this, Julie was President of the Emerald Necklace Conservancy for eight years, where she grew the annual budget from \$200k to \$1m, completed restoration of the Shattuck Visitor Center and organization's headquarters, and launched the organization's first youth programs. Julie worked with ESC while at the Conservancy, and saw first-hand how their consulting services transformed nonprofit organizations. Other former positions include Director of External Affairs at the Museum of African American History, Deputy Director of the Boston History Collaborative, and Executive Director of the Boston Institute for Arts Therapy.

Julie is currently on the advisory council of the National Association of Olmsted Parks, and has served on the boards of organizations including PCI (Project Concern International), Emerge Massachusetts, Piers Park Sailing Center, and UNICEF. She has a BA in psychology from George Washington University.

**David Factor – President and CEO, ESC Southern California**

David has served as President and CEO of ESC Southern California since August 2013. In this role, he is responsible for steering the overall vision and strategy for ESC, which includes establishing new initiatives in the greater nonprofit community, strengthening board and contributor relations, and providing strategic support to program staff and leadership. Prior to being appointed President of ESC, David served as Vice President, Consulting Services beginning in 2011.

David has more than 30 years of experience serving charitable ventures, entrepreneurial and mature businesses, and the public sector. David has served in professional roles for the Jewish Home for the Aging, the Southern California Association of Governments and elected officials in Sacramento and Los Angeles. He is Vice Chair of the ESC-US Board, a member of the Advisory Committee for Valley Nonprofit Resources, and serves on the Advisory Board of Educate California. Additionally, David currently serves as a Trustee of the Max Factor Family Foundation, and as a member of the Board and Endowment Committee for Adat Shalom congregation.

David earned a BA, with honors, from UC Davis specializing in Public Service and Energy Policy. David's wife, Holly is a nurse supervisor at a pediatric practice. They have two adult children, Perry and Reina.

**Melanie Hillenbrand – President and CEO, NESc of South Florida**

Melanie has a passion to help organizations build the capacity of leaders to drive success. Before leading her own consulting firm focused on executive development, Melanie held senior level leadership and organizational development positions at Mercer HR, KPMG, and Bellevue Hospital. She also served at CNA Insurance and with the Blue Cross/Blue Shield Association.

Melanie has received recognition for two major initiatives which have been judged as “best-in-class.”

The first was development of a Business School for over 600 partners and managers to help them develop leading edge skills in consulting to their Health and Life Science business sector. The second was the creation of a Global Career Development program for the 15,000 consultants of an international HR consulting firm.

Melanie has a strong track record of building teams that get results, notably successfully managing a national interdisciplinary team of over 100 professionals tasked with realigning a 12,000 person organization. She has particular expertise in functional start-ups and turnarounds, in one case enhancing employee satisfaction by over 200% while increasing product offerings and reducing costs by over 30%. She has also been a pioneer and facilitator of 360 degree feedback systems, as well as assessment tools such as MBTI, DISC and several other well-known tools.

Melanie holds a BA from Boston University and an MBA from DePaul University.

**Darlyne Koretos – Chair, ESC-US**

Darlyne is a public relations specialist with a background in strategic planning and implementation across a broad spectrum of industries, including nonprofit agencies. Darlyne is the principal and founder of Tap Your Potential and Pivot Crisis PR. She has previously served as Director of Marketing/PR for ESC Cincinnati, and a Communications Consultant with Fidelity Investments in Kentucky. Earlier in her career, she ran her own PR consulting agency and was Manager of Corporate Public Relations for Litton Industries.

Volunteerism is very important to Darlyne. She is board chair of the ESC-US affiliate network. Her past community activities include serving on the Communications Committee of Women Helping Women, as well as the Steering Committee of Safe & Supported, a program of Lighthouse Youth Services. She has also volunteered as a CASA for Pro Kids, Bethany House, Hospice of Northern Kentucky and STOP AIDS Board Secretary.

**Kerry Kozuki – Director of Management Consulting and Services, 501Commons (ESC Seattle)**

Kerry grew up near Williams Lake, BC, Canada, and completed his undergraduate degree at the British Columbia Institute of Technology. He later received his MBA at the University of Washington and gained his Six Sigma Black Belt certification from Villanova University.

His career has largely been in hospitality, including managing hotel operations at the Washington Athletic Club for eight years. More recently, he relocated to Spokane to work as a business consultant and has now moved back to Seattle where he works with his team at 501Commons. Kerry sees transitioning to the nonprofit sector as a way to make a difference in the world. One particular issue close to his heart is addressing rural and intergenerational poverty, helping that population find the resources, education and confidence to elevate their life experience.

Kerry loves travel and picks up languages easily. His favorite travel destination is Bali, Indonesia, but he's visited 25 countries at last count! Foreign cultures and ways of living fascinate him, as well as exploring the outdoors through mountain climbing. He is also a Reiki III practitioner, doing some sound healing work and leading meditation groups.

**Barbara Lindner – President, NESC (ESC New York)**

Barbara brings to NESC extensive experience in leading strategic banking technology mergers and large academic healthcare systems and operations. After spending her early career developing innovative centralized customer service centers for many of the nation's largest banks, Barbara formed her own consulting firm in 1989, through which she was asked to lead the retail banking system mergers that resulted in today's JPMorgan Chase. Her assignments spanned 8 years and multiple mergers, with her financial service clients including Citibank, Master Card, American Express, and Merrill Lynch.

Upon recognizing that her experience and skills were transferrable to Healthcare, specifically hospitals, Barbara pivoted from banking to hospitals, bringing her understanding of the challenges facing large institutions trying to merge culture, systems, operations, and facilities. She spent 5 years with St. Luke's Roosevelt Hospital (SLR), where she created new departments, implemented new electronic medical records, and brought the second largest division in the hospital out of financial deficit and to profitability. Following her tenure at SLR, she was recruited by New York Presbyterian Hospital as Director of Behavioral Health. Working with the medical colleges of Cornell and Columbia, Barbara also presided over the creation of the two cross-campus clinical research centers both reliant on her ability to navigate the complex environments of academic medical centers and large affiliated healthcare systems.

Barbara holds a Master's Degree in Public Health Administration from Alfred University and a Post Graduate Certificate in Integrated Healthcare from New York University.

**Paul Moore – President, ESC Central Oklahoma**

Before joining ESCCO – first as a volunteer consultant and then as President – Paul completed a 40-year career with the Boy Scouts of America. He has served as CEO of Scout councils in Los Angeles, Salt Lake City, Oklahoma City, and Charlotte NC and as a member of the BSA National Staff. Paul is a member of Rotary Club 29 of OKC and serves on the alumni board of Leadership OKC. During his career, Paul was responsible for recruiting, training, and leading over 100,000 volunteers. He secured more than \$10 million in capital funding, and \$100 million in operating support. Beginning in 2005, he was certified by the Fieldstone Foundation as a coach to nonprofit CEO's.

**Jim Rather – Program Administrator, ESC Houston**

Prior to joining ESC Houston, Jim retired from Keane (a consulting company based in Boston) where he at various times managed an outsourcing engagements that involved employees in the US and India, was Service Delivery Manager in Houston, and managed projects throughout the US. Jim began his career at IBM, was the VP of IT for Hibernia National Bank in New Orleans, and has also previously served as the Assistant Director of IT at McDermott International, where he was responsible for over twenty international IT facilities

Jim holds a BS in Chemistry and Physics from Western Kentucky University, an MS in Physics and an MBA from Tulane University in New Orleans.


Miles Robinson – Vice President, Empower Success Corps (ESC Boston)

Miles recently joined ESC as the Vice President after having been a volunteer consultant since 2011, Board Member for the last six years, and Vice Chairman of the Board of Directors for the last two years. In this new role, Miles will oversee consulting, operations and IT as well as serve as an ally to nonprofits, public sector agencies, community partners and volunteer consultants.

Throughout his impressive career, Miles has held numerous consulting leadership positions, including roles at Bearing Point (formerly KPMG Consulting), Edgewater Technology Inc. and most recently as the Co-Founder and Senior Managing Partner at Cosenta LLC. In addition to these roles, he served in analyst and project coordination roles for both the Maryland Higher Education and Morgan State University.

Miles has a B.A. degree in Political Science from the University of Massachusetts, Amherst and a M.S. Degree in Public Policy from American University. He has a passion for public service and providing better access to underprivileged communities through the development of improved public policy and community services. Robinson lives in Bedford, MA with his wife Amy and two children, Jadyn and Max. As a family, they enjoy golfing, skiing and hiking together.


David Sanchez – Board Chair, NESc (ESC New York)

David was elected Chairman of the Board of NESc in July 2019, after having been affiliated with the organization for a number of years. He is the Founder and CEO of Singular Global Advisors (a consulting firm specializing in alternative investment vehicles) and is a Managing Director with Zanbato Securities (a broker dealer specializing in brokering secondary securities). Prior to joining NESc, David served as President and then Board Chair for ESC South Florida for close to ten years.

Prior to his work with various ESCs, David was President of Sanchez Global Advisors, LLC, in Beverly Hills; Managing Director at Bear Stearns & Company in Los Angeles; and Vice President at Merrill Lynch International in Beverly Hills. He also headed the Mergers & Acquisitions Department for Latin America as Vice President of Bankers Trust Company in NYC, and served as an Assistant Treasurer in the M&A/Financial Advisory Department for JP Morgan in NYC.

As President of the Yale Club of South Florida David serves as a leader in Yale's Global Day of Service, of which he was the inaugural Global Chair for two years. He is also an active Rotarian, serving as a catalyst to sponsor and support scholarship programs with 40+ Rotary Clubs and summer exchange programs for West Point cadets to China and Russia.

Mr. Sanchez graduated from Yale University with an M.A. with Honors and an M.Phil in Political Science and was a Fulbright Fellow, a Ford Foundation Fellow, a Tinker Fellow and a Yale Fellow.


Michael Towers – Chief Financial Officer, NESc (ESC New York)

Michael joined NESc in 2012 with a background in financial management, financial reporting and business operations management. Before this, Michael held a number of senior management positions at the McGraw-Hill Companies, including Business Manager/Controller of the Aviation Week Magazine Group and Business Manager/Controller for Technology and Global Customer Support operations for the Business Information Group. He was the financial leader for many internal Business Improvement Projects or "Tiger Teams" which went to different companies within the McGraw-Hill group in order to identify and deliver revenue and process improvements.

Michael also served as Chief Financial Officer/Chief Operations Officer for an internet startup funded by Pearson; Vice President Finance at a division of Scientific American; Vice President Finance of Academic Press; and Director of Finance for ABC Consumer Publishing and CBS International. At CBS, he was Director of Finance and Budgets for Latin America, and has lived in Mexico, and worked in Argentina, Brazil, Colombia, Ecuador, Peru, Puerto Rico, Spain, Uruguay and Venezuela. He held similar positions in New York, overseeing Canada, the United Kingdom and France. He has extensive experience in managing multi-million dollar budgets, business feasibility analysis, and project and financial reporting.

Michael received his BS from Georgetown University and his MBA, Finance from Columbia University.

**Yvonne VanHaitsma – Associate Director, Covestro Center for Community Engagement at Robert Morris University (ESC Pittsburgh)**

Yvonne began working with the Bayer Center for nonprofit management in 2000, initially working with nonprofit organizations on collaboration planning, strategic planning, and board development. Now she works building collaborations between companies and nonprofits, creating win-win-win relationships that build nonprofit capacity, corporate social responsibility, employee engagement, and purpose-driven opportunities for companies and their workforce. She manages the Executive Service Corps, SkillShare, and BoardsWork! Programs within Covestro.

Yvonne earned her M.S.W. in Community Organizing and Nonprofit Management at the University of Pittsburgh and has worked with nonprofits in Pittsburgh, Ecuador, and El Salvador.

**Jody Yetzer – Manager of Consulting Services, OneSource Center for Nonprofit Excellence (ESC Cincinnati)**

Jody is a New York licensed human and civil rights attorney. As an attorney with Beldock, Levine & Hoffman, she specialized in civil rights, particularly class action, pattern-and-practice and individual employment discrimination and retaliation cases. Jody was also formerly with the ACLU and CCLU, where she was involved in developing cutting-edge constitutional and other legal challenges concerning reproductive rights, fair housing, due process and First Amendment cases.

Jody served as Founder and President of the Women's Union and President of the Classics Club at her alma mater, Union College, in New York. While attending Yale Law School, she was Editor of the Yale Journal of Law and Feminism and Student Director of the Poverty Law Clinic. Jody now volunteers with Dress for Success as a career counselor specifically focused on women with criminal histories.