

Call #5 -- ESC-US Peer Affiliate Conference Call -- Thursday, 9/19/19 - 2:30PM

Annual Meeting Takeaways

Attendees

Name	Affiliate	YES	NO
Craig Kowalski		X	
Darlyne Koretos		X	
Wendi Wilson	OK	X	
Paul Moore	OK	X	
Miles Robinson	Boston		X
Jim Rather	Houston		X
Burt Hering	Houston		X
Jody Yetzer	Cincinnati	X	
David Factor	LA		X
Barbara Linder	NESC		X
Yvonne Van Haitsma	Pittsburgh		X
Susan Loucks	Pittsburgh	X	
Julie Crockford	Boston	X	
Michael Towers	NESC	X	
Kerry Kozuki	501 Commons	X	
Julia Fischer	LA	X	

Demographics of the Conference Call today

- Ten attendees representing seven affiliates were on the call today.

Takeaways from the National Meeting

- New tools were presented, and these may be discussed in future calls; tools such as Confluence and Pathways, both from 501 Commons.
- Fund development concepts are important, particularly nuts and bolts issues.
- DEI – diversity, equity and inclusion. ESC-US planning to start a task force.
- Discussed how to assist each other by offering services, such as virtual training and webinars.
- Reinforced concept that expert consultants can fill in gaps in other locations. Started last year with loaned virtual consultants (see Julie Crockford).
- Coaching program – offer free coaching to other staffs (see Paul Moore).

DEI

- 501 Commons seems to be the leader, with a published white paper on how to approach the subject. Created a “DEI audit”. Perhaps ESC-US can take this concept to a national funder to show that the ESCs are indeed engaged in this effort. Some funders were suggested. 501

Commons has been working on this for two years. Threat is that we are not diverse. We may get passed by in the market.

- Boston is taking DEI very seriously, and recently hired a consultant. 501 Commons also hired a trainer. We think our clients will appreciate a better DEI lens.
- Darlyne asked that anyone interested in this subject call her, and noted that The Greater Cincinnati Foundation offers free DEI training to nonprofits, their staff and consultants.
- Susan Loucks talked about questions of privilege in consulting and attendant concerns. Not setting Pittsburgh to be the go-to organization for DEI.
- Jody says that there are concerns. Some list DEI resources on their websites. These have more competency than an ESC, perhaps.
- Julie is looking for more cultural competence.

Other

- Julie mentioned shared expertise in school-related consults, especially NESC. Maybe one of their consultants might be a resource to other ESCs.
- Boston once did a totally remote consult.
- Julie mentioned that Houston does remote tech consults with students.
- Network offers collaborative services to each affiliate.
- Kerry will be happy to show Confluence, which is an internal Wiki (better than SharePoint, which is clunky). Has to be shown in a webinar. 501 Commons has done customized work, which is necessary. NESC has already asked for a demo (and maybe Boston).
- Kerry thinks DEI is timely. Focus DEI around capacity, making it a more pragmatic approach.
- Jody discussed collaborations, such as with universities, searches and internal efforts. National protocols.
- Julie said that Felicity's presentation about metrics was straightforward and very good. The PowerPoint can be shared. Darlyne asked that anyone on the call who made a presentation should send to her for posting on the website.

Network at a Glance

- LA survey has a checkbox to indicate approval to be quoted. Saves time and effort.
- Julie is willing to collect these documents and forward to Darlyne

Outside Speakers

- Tony Farina of Baruch and David Hartingh of the International ESC made presentations. Baruch used NESC as a case study for a team of students. Gave them experience in a real life setting. Perhaps they can be used in actual consults by other affiliates in the network.
- The ESCs grew out of the IESC. David presented an overview and attended for the entire day.

Service Engagements

- Kerry wants to leverage service corps engagements in order to get larger ones. Smaller ones may not be worthwhile other than to fulfill the 501 Commons niche. The ESC seems to think service corps projects are of lower value and use only service corps members.

- Perhaps pricing is the problem.
- Have a Lot of board work, but maybe 501 Commons is undercharging. Maybe we don't have confidence to charge more.
- Perhaps should make pricing templates. Maybe training so they won't have an issue of being afraid of consultants underperforming.
- Have a bad tendency to take all projects.
- Paul: if you don't feed a tiger, you cannot keep it. We are so volunteer driven, and must stop and think about what we expect consultants to do.
- Pittsburgh: the funding university wants more revenue.