

ESC-US PEER CALL NOTES – MAY 6, 2020

Participants: David Factor, Darlyne Koretos, Michael Towers, Wendi Wilson, Craig Kowalski, Joel Greenbaum, Paul Moore

Joel has developed Best Practices Guide to Virtual Meetings, which he hopes we will find helpful. He said he'd be happy to co-brand it if we wish to use it locally.

https://drive.google.com/open?id=1f9bX_eV1oTT2fJPGkhMmm1xt1Ggv0k9k

David asked us to recap how things are going.

Craig has 3 stalled projects (strategic plans) and 5 organizational assessment.

Darlyne has one stalled project, and said Jody is scheduled to start a strategic plan 5/21, while wondering whether that might be too soon.

Michael bought 20 Zoom suites that seem to be working well on a project.

Joel just started a strategic plan. Virtual seems to be working favorably, broken into bite-size sessions. Consultant reluctance seems to be resolving as they become familiar with methodology.

Wendi has some concern about adapting ESCCO's Organizational Focus Workshop to virtual. She has made sure funders know they are available to help challenged nonprofits.

Paul is working on one traditional forensic project and said it may wind up being virtual from start to finish, never having met the client ED.

David said some strategic plans have slowed down but they are continuing. They are doing pro bono coaching, and sees ESC's 1:1 caring as an advantage. They've done 4 trainings on using Zoom.

Darlyne said Cincinnati is also offering training on using Zoom.

David said LA is getting ready to pilot strategic planning triage and that might be helpful to Wendi's OFW concerns. They are offering it to current and past clients. They may need to move fast to not get left behind. 50% of his business comes from paid leadership coaching but now they will offer 2 or 3 sessions free.

Craig said Cincinnati is offering a "What's Next?" product, so far at no cost. It's a re-launch product, perhaps as a cohort or individually.

Paul said it is timely to think about what would be the best way to accomplish our mission in a changed environment. Rather than "how can we make it as much like the way we did it" as a clean-sheet approach, "if this was to remain our world, how would we start from scratch."

David said that becomes a question of re-launch or re-invention.

Darlyne feels this would make a good affiliate call.

Joel said he has reached out to major funders re how to help their funded organizations. He is offering a post-pandemic needs survey. It's pro bono but gets a foot in the door. The funder would send it out to their funded organizations, as an online survey or by phone.

David suggested we make this the next call topic, in two weeks.

Paul suggested the concept could be called Phoenix.

Wells-Fargo has asked LA to redo their grant application and focus on how they will use the money to help related to Covid.

Paul said companies and funders want to be seen in a favorable light in this situation.

Wendi said she is waiting to see the effect but initially funders are not changing direction, just making some special initiatives.

Joel said marked performance may limit the amount of their distributions.

Darlyne wondered if we could add products related to risk assessment.

David said short-term vs long-term risk assessment would be worth looking at in a future call or meeting.

Paul said Gensler is seeing office space needs as remaining relatively the same, less people office-based but with more space in between them, and accommodating home-based employees when they do need to come in to the office.

David said social distancing will affect their institutes. He said ED's have welcomed the opportunity to talk, share their challenges.

Darlyne sees a need to train our consultants on how to use Zoom.

Darlyne said the 5/21 call will focus on Covid responses.