

ESC-US PEER CALL – 5/21/20

Covid-Emergent Assistance

Participants: Julia Fischer, Jerry Lewis, Michael Towers, Darlyne Koretos, Wendi Wilson, Jim Rather, Burt Herring, Vicky Foxworth, Julie Crockford, Craig Kowalski, Jody Yetzer, Joel Greenbaum, Paul Moore, David Factor (Facilitating)

Before we got into the COVID-19 discussion Joel Greenbaum shared that they have renamed their organization as Executive Service Corps of South Florida. New logo represents new energy in moving forward. (Former name: NESF of South Florida.) Major marketing campaign to come.

Jerry Lewis described Cincinnati's new effort, Relaunch. They are partnering with Pro Bono, who referred two agencies that thought they needed to dissolve. They convene, define issues under major themes, then look at what could be done to make them viable. They review the agency's mission statement (who's the client, what does the client need, what do you do to help that client) and either confirm or modify it. Research is a key component of this product. Their two-person team meets with 5-7 people from the agency as a steering team and have a discussion about saving them or partnering them with another. They choose the steering team based on what they saw of various people during the interviews. They then build a 90-180 day business plan, not a strategic plan. Some of this is client-paid and some is paid by a grant. The team intends to work 3-4 months with the client agency. Jerry said they currently have 14 clients who are into various phases of the relaunch. Julie asked Jody how they pitched the grant request; Jody will follow up and get a response.

Michael said NY has about a dozen projects from before Covid. New projects have all been finance-related, along the lines of finances not keeping up with their growth. Nothing's really changed.

Julie said New England is seeing a slowdown in new inquiries. They had 100 projects in FY 2019 (ending 9/30/19). So far in 2020 they have 20 projects. Ongoing projects went on hold. Consultants want work. Proposals submitted during Covid have not yet come to fruition. They have helped with PPP. Nonprofit executive roundtables (peer coaching) are continuing online with excellent participation and really appreciate the opportunity to commiserate with each other. Lots of HR related conversations. They were amidst a strategic planning process themselves and had to pause. Her consultants are doing some searching for ways in which they can help. Clients want immediate help during COVID-19. They don't want to wait. She sees a need to become less bureaucratic in their intake process. Working on steps of "how to survive and then thrive." Julie's VP of Consulting has resigned and she addressed the matter of the ED becoming a bottleneck especially in these circumstances. Julie described their roundtable process, beginning with 9 themed meetings in the first year. Each group has a Dropbox of their own. Becomes less structured in the second and third year; begin each session with a "9-1-1" conversation/problem-solving. Julie said there's a tension between moving quickly and listening to see what's needed.

Wendi reported on OKC's Board meeting discussion this week, which produced aha moments such as "not getting calls because they don't want to have us tell them their hard truth." Another Board member, head of a large non-profit, we would not be at the top of his call list because they are part of a national/international peer network, and he had almost too many offers of help, ideas, etc. May need

to look at how ESCCO is perceived in the community, perhaps as a fixer more than a friend. Julie asked that Wendi and Paul share the ESCCO OFW with the group.

Jim said Houston needs to get a better focus on what their clients need in this environment. David suggested that the OFW could be worth Houston's consideration.

Vicky reported for LA. About 20% of their clients are on some sort of pause. Some have asked for alternative payment options. They are offering pro bono leadership coaching. They recruited and trained about 20 consultants and have invited 20 nonprofits, so far with a 25% response rate. Julia noted the themes of wanting to respond quickly but also understand what is going on out there. She shared a report on the Center of Community Investment's Strategy Triage Tool that one of their consultants had found. Craig provided a link: They modified and are using it to target past strategic planning clients who are in the implementation stage. They will train 3 consultants to use it, doing 2 90-minute pro bono sessions working with the current strategic plan. This will also provide a coaching session for the ED. David said this will be piloted with his leadership team this afternoon. Julie Crockford liked the idea of taking this back to recent strategic planning clients.

David spoke to the desire to move quickly, saying that he thinks the best path to a quick response is in approaching clients we've worked with previously. "Do it today" may bump into people's feeling of overload, but don't be the last resource to reach out to them.

Darlyne said that a conversation with business people yesterday yielded a sense that collections may be more difficult, so get your billings out sooner rather than later.

Joel spoke about South Florida's guide to video-conferencing. He also reminded us about 501's five themes product, which their consultants had reviewed. He thinks the Pathways version may have application to his clients. He has offered pro bono services but has not had any takers yet.

David said that looking for opportunities for our clients seems to lead to opportunities for us to help these clients.

Jim asked when we might get through to the other side, and what might the other side look like. This could be a major opportunity for us to help clients envision. David says that the SWOT you did 4 months ago is not today's SWOT. Helping our clients with this is essential.

Vicky lifted up a resource from a former intern who now works for Boston Consulting Group. She will forward it to Darlyne for sharing.

Darlyne thanked David and the group for great input. A small group will be reaching out to all affiliates about the National Meeting, which is going to be virtual. Our next call on Covid will be June 18th at 2:30 Eastern, facilitated by one of Julie's team, a former national training manager for Staples.