**ESC-US PEER CALL NOTES - January 20, 2022**

**Facilitator Jody Yetzer; Convener Craig Kowalski; Recorder Paul Moore**

**Hanna Fink SFL, Jim Rather HOU, Sharon Cosimano HOU, Corey Correnti CHI, Candice Miles Triangle, Wendi Wilson OKC, David Factor LA, Michael Towers NYC, Joel Greenbaum SFL, Vickie Ciotti CIN, Kristyl Smith LA, Jan Burrell SEA, Yvonne Van Haitsma PBG, Julie Johnson CIN, Sherrie Terry CIN**

Jody asked each affiliate to share one 2021 Success and one 2022 Challenge.

OKC - Wendi: Board Strategic Focus (Organizational Focus Workshop) for the affiliate produced good results. The challenge is getting the right consultants.

*Jody polled the group: Most volunteer onboarding is being done virtually.*

SFL - Joel: Partnership with Community Foundation has yielded 3 cohorts of 12 so far, on resiliency risk management. Participants can receive a $25k grant from the foundation. Challenge: Holding back on board development pending completion of strategic plan. *Appreciates ESC-US volunteer consultant exchange, which is working well for them.*

HOU - Sharon: New ED. Jim: Success is bringing Sharon aboard. Challenge is getting their revenue stream coming in on a timely basis. Needs projects and volunteers.

LA – David/New Assoc ED Consulting Kristyl: Successful structure to provide coaches to multiple people in a very large organization while maintaining confidentiality. They are coaching 20 in just one department. Challenge: Finding leaders of color for a large funded effort in leader development for 40 new clients. *David offered expertise on business model for coaching.*

PBG – Yvonne: Success with recent grant to expand board training and development inclusive of people with disabilities. Challenge: Struggles of higher education sector, their umbrella, hiring.

Triangle – Candice (Board Chair): Success in being strategic, intentional, purposeful in relationships, improving their operational practices. Challenges: How to better encourage potential clients to engage, grow their revenue stream. Volunteers are working to help maximize their technology.

CIN – Vickie: Getting contracts signed and projects off the ground on a timely basis. Challenge: Changing to faster starts. *Lifted up ESC-US Executive Director Roundtable.*

*Jody had Paul describe the Roundtable.*

*Jody suggested that affiliates doing internal strategic plans should connect with other affiliates.*

SEA – Jan: Funder focus on BIPOC-led organizations showed a need to prove their competency with such organizations. Challenge: Diverse volunteer and staff placements.

CHI – Corey: Regrouping of their business model due to Covid. Challenges of keeping consultants engaged. *Yvonne asked for status info; Corey said they have about 200 consultants, with about 1/3 being most engaged. They are working to find talent matches, and to update technology.*

*Jody polled the group and found that most (2/3) have CRM systems. SEA can help customize it. Michael said they got a Sales Force consultant to volunteer with them and set up their system.*

NYC – Michael: Turned a corner in 2021, ended with doubled cash and a 5-fold increase in their book of business. Challenge: All staff is focused on one giant client, finding it hard to cover small clients. They need staff regional directors for NJ and Long Island.

*Jody reminded the group of a white paper on executive searches, which is on the website. About 50% of affiliates do searches and they are 1/3 of NYC’s income.*

*Yvonne did a shout out to Julie Crockford, Boston, for her commitment to DEI as an ally.*

Craig suggested potential future peer topics, from today’s discussion, and asked for other ideas:

* How to collect and communicate impact for grants – Sharon requested, Wendi suggested LA as resource.
* Coaching as a key service
* CRM
* Technology
* Corporate relations – Yvonne
* IDEA-DEI work – Yvonne
* Focused products – David

Other discussion:

Joel spoke to 501’s assessment product

Kristyl appreciates the opportunity for sharing and replicating best practices

Yvonne said Covid has helped us improve our networking

David affirmed the ESC-US core value of sharing

Corey asked for a schedule of Peer Calls; Jody said we’ll create an advance calendar

Yvonne reminded all that their classes are free for us

OKR (Objectives and Key Results) would be worth exploring

Consultants could take on some of the topics we’d like to study