

2016 REPORT TO THE COMMUNITY



STRENGTHENING THE
COMMUNITY
THROUGH OUR WORK WITH
NONPROFITS



2016 RESULTS



TOTAL REVENUE:

\$214K

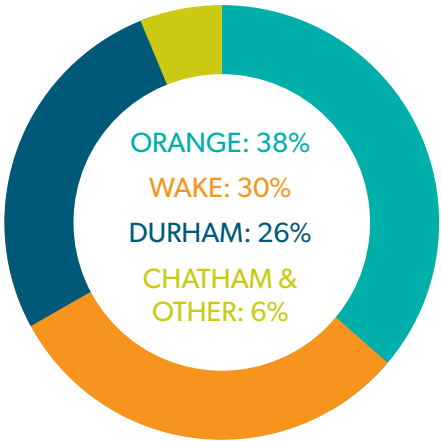
REVENUE BY SOURCE



TOTAL ENGAGEMENTS:

89

ENGAGEMENTS BY COUNTY



TOTAL CLIENTS SERVED:

67

CLIENT SIZE

\$0 - \$300K	42%
\$301K - \$750K	15%
\$751K - \$3M	28%
OVER \$3M	15%

LETTER TO OUR STAKEHOLDERS

When I look back at 2016, I am so proud of our nonprofit clients and their tremendous accomplishments.

Our role at ESC is to help our clients achieve their missions by providing them with quality programs and services that enhance their abilities. We believe we are strengthening our community through the good work we do for them.

I am so very grateful to our volunteer consultants for their professionalism and dedication that make all of our work possible. To support our consultants, we improved our recruitment, orientation and training programs this year to enhance their performance and keep them current.

Last June, we developed and launched a successful new service called Build a Better Board. This free online service matches nonprofits looking for potential board members with leaders interested in serving on boards. The service is so valuable that we hope to be able to license it to our affiliate ESCs and other organizations nationally beginning in 2017. More on this exciting achievement can be found later in this report.

We also proudly planned for the first use of the Perry Colwell Nonprofit Acceleration Fund, a special ESC fund designed to raise money for the development of nonprofit leaders in our area. We created a new pilot workshop called “Good to Great: 2 Leaders, 1 Partnership” designed to enhance the relationship between a nonprofit’s executive director and board chair to help them become a better leadership team. The workshop is conducted over a weekend at a local retreat center with overnight accommodations provided.

We continued in 2016 to optimize our own organization by conducting an ESC board retreat and carefully evaluating progress on our new three-year strategic plan. We model the behavior we recommend to others by utilizing our consultants to help us optimize our organization’s functions and processes.

We could not do any of this without the generous financial support we receive from individuals, foundations and corporations. These donations were used in part to reduce costs for clients who could otherwise not afford to use our services. In addition, the donations were used to defray our administrative expenses and to provide training and development programs for our consultants.

As you read through our annual report, I hope you will be as impressed as I am with our clients and their achievements. We are pleased at the progress we made in 2016 and believe we are indeed strengthening our community through our exceptional work with nonprofits.



Trudy Smith

Trudy Smith
*Executive Director,
ESC of the Triangle*

Executive Director Trudy Smith has been with ESC for 11 years—significantly expanding the role and reach of ESC within the Triangle community. Trudy’s goal is to further strengthen the community through the good work of ESC. She is committed to quality, innovation and measuring outcomes to ensure maximum effectiveness.

FAMILIES TOGETHER

STAFF RETREAT



“Working with ESC helped us to be poised for the growth and change that is ahead.”

– Lisa Rowe, Executive Director, Families Together

FAMILIES TOGETHER, an organization that works to help people move from homelessness to stable homes, already had a success story to tell about how many transitions to permanent housing they provided in Wake County. Still, with a growing and changing staff, Lisa Rowe, executive director, saw a need to strengthen her team. She turned to Executive Service Corps of the Triangle (ESC), and that, too, has proven to be a success story.

ESC organized a team-building staff retreat, and Rowe, who had been on the job for about 18 months, said she and her staff came away energized and emboldened to deal with change and growth. “The timing could not have been better,” she said. “We were already a strong team, and we are stronger now.”

Families Together has a 37-year history that starts with its original founding in 1980 as Pan Lutheran Ministries (PLM). The organization remains a PLM organization, but it has evolved into a million-dollar nonprofit with a staff of 10 and approximately 575 volunteers devoted to its mission: “Moving Wake County families from homelessness to stable homes through mentoring, housing support and connecting to community resources.”

About 35 percent of its support comes from local governments and the rest from private contributions. Most families come to the organization by referral from the emergency shelters where they have been housed. For those unable to stay in a shelter, the organization owns six apartments for short-term housing of homeless families with children. It works to move those families from emergency to settled housing arrangements within 60 days, and about 70 percent of the families served have done just that. Families Together worked with about 180 families in 2016, most headed by single

mothers. Families Together assisted 70 families in moving to permanent housing that year. Their aim for 2017 is to increase that number to 85.

Most of the adults in the families served are employed, but average monthly incomes are often too low to cover the up-front costs required for move-in. So, Families Together provides direct financial assistance, including first month’s rent and utility deposits, along with financial education and referrals for job training and employment counseling to keep them going longer term.

It works. More than 80 percent of families maintain stable housing for at least a year. That is accomplished by partnering with property management companies and individual landlords to place families in rental housing and help them stay there.

Renting to lower income families can be a risky business. “A lot of folks are willing to take a risk with our families because they know that we are going to be there to provide support,” Rowe said. “For us, it is not just about getting someone housed, it is about helping them stay housed.”

Families Together has found success working with ESC in each of the past three years, with services ranging from strategic planning to leadership training. With the latest team-building endeavor, Rowe has stated being more than satisfied. “Working with ESC helped us to be poised for the growth and change that is ahead,” she said.

The satisfaction is mutual. The ESC consultant who facilitated the retreat remarked on the impressive quality of the Families Together staff and their clear, obvious dedication to the work they do and hopes there will be more opportunities to work with them in the future.

COMPASS CENTER FOR WOMEN AND FAMILIES

STRATEGIC PLAN



“I would give our consulting experience a 10 out of 10.”

– **Cordelia Heaney**, *Executive Director, Compass Center for Women and Families*

WHEN COMPASS CENTER FOR WOMEN AND FAMILIES (COMPASS CENTER) sought to broaden its reach and strengthen its message, the organization turned to Executive Service Corps of the Triangle (ESC) for help, and they got it.

Compass Center was created in 2012 with the merger of two organizations, the Women’s Center, started in 1979, and the Family Violence Prevention Center of Orange County, founded in 2000. Even four years after that merger, the new brand and the combined mission needed to be strengthened and clarified.

That led to the organization contacting ESC, and two consultants went to work to help. The consultants set up eight sessions on strategic planning, two focus group meetings and multiple critical issues discussions.

“It was a really collaborative process,” said Cordelia Heaney, executive director of Compass Center, as plans and solutions were guided but not dictated. That made the process more effective because it was a shared exercise involving a committee of Compass Center staff and board members, as well as discussion with the full staff.

Compass Center operates with a staff of 11 full-time and three part-time employees and also relies on the work of more than 200 community volunteers. The organization provides three main areas of service to the community: domestic violence crisis and prevention, self-sufficiency services and teen health programs. About 5,000 clients are served every year, and approximately 1,400 of them are victims of domestic violence.

“We empower people to navigate through challenging times in their lives,” Heaney said.

That was codified in a new mission statement developed with ESC assistance: “Compass Center for Women and Families helps all people navigate their journey to self-sufficiency, safety and health. We empower individuals and promote equal access to opportunity regardless of gender or economic status. Our services include career and financial education, domestic violence crisis and prevention programs, assistance with legal resources and youth health programs.”

Compass Center operates on an annual budget of \$790,000. About 55 percent of its funds come from state and local governments. For the rest, it relies on contributions from individuals and grants from foundations. So, telling its story is vital to fundraising, growth and gaining the volunteers who contribute so much to the organization’s work. “We want to make clear not just what we do,” said Heaney, “but why we do it.”

Laura Morrison, who was board chair of Compass Center when the ESC consulting contract began, said, “Our goal was to get name recognition and communicate with the community who we are and what we do.”

ESC guidance is helping now as the organization works to achieve that and other aims.

“Our ESC consultants asked the tough questions and pointed us toward our goal,” said Morrison. “They were awesome.”

By setting goals and steps to achieve them, Heaney said, “The process really helped us build a road map for the next three years. I would give our consulting experience a 10 out of 10.”

THE HAYTI HERITAGE CENTER

EXECUTIVE COACHING



“It made a big difference having someone with whom to share my concerns and our positives.”

– Angela Lee, Executive Director, The Hayti Heritage Center

THE HAYTI HERITAGE CENTER, a cultural enrichment and arts education facility, works to preserve and share the remarkable story of an African-American community that became an integral part of Durham. It does this by offering programs and events that embrace and promote understanding of the community’s rich cultural heritage.

When Angela Lee, the executive director, saw a need for a management tune-up, she turned to Executive Service Corps of the Triangle (ESC) for help. ESC stepped in to provide Lee with executive coaching to help her achieve the results she desired for herself and her organization.

“It turned out to be a very good match,” she said. “It made a big difference having someone with whom to share my concerns and our positives.”

She feels her executive coaching has made her a better manager of her staff of three full-time and two part-time employees and more effective in working with the board of directors.

The Hayti story is not widely known, even in neighboring communities. The Hayti Heritage Center has been working since 1975 to change that with its mission of “preserving and advancing the heritage and culture of historic Hayti and the African-American experience through programs that benefit the broader community locally, nationally and globally.”

The Hayti community of Durham emerged after the Civil War when freed slaves came to the area and were forced by Jim Crow segregation to settle on the “other side of the tracks.” It became an independent community on the edge of what is now downtown Durham.

As Durham became a railroad town and thrived as the center of the tobacco industry, increasing numbers of freedmen migrated north to work in those industries and in the trades and skills they had learned on the plantations.

They named their community in recognition of the Haitian revolution, the only slave rebellion that led to the creation of an independent nation. In 1891, they built what became St. Joseph’s Church, which is now part of the Hayti Heritage Center.

By the early 20th century, there were more than 100 businesses and 500 homes in the community, which Booker T. Washington called “Black Wall Street.”

St. Joseph’s Church was renovated in 2001 into a 400-seat performance hall, which preserved its stained glass windows and hand-painted tin ceilings and is listed on the National Historic Registry.

That is where many of the Hayti Heritage Center’s programs are held, including a music series, blues and film festivals and spoken word performances. It also features artist exhibitions and dance and aerobic boxing classes, and facility rentals and tours are offered year round. They have more than 30,000 visitors a year.

Those are the operations Lee sought to strengthen with ESC consulting help. “My coaching was a very useful and positive experience,” she said.

WAKE COUNTY SENIOR GAMES

BOARD MATCHING & BOARD DEVELOPMENT



“There have been very important, tangible results from our work with ESC.”

– Marilyn Asay, Board President, Wake County Senior Games

WAKE COUNTY SENIOR GAMES (WCSG) is a successful, small nonprofit working to keep people 50 years and older involved in sports, fine arts and performing arts activities. In 2016, 514 seniors participated in its athletic and artistic competitions, and the organization’s aim is to double that number in the near future.

With that in mind, the organization needed to broaden its leadership by recruiting a board of directors with skills in marketing, communications and other such expertise.

That is where its goals meshed with the new board matching program created by Executive Service Corps of the Triangle (ESC) called Build a Better Board. By allowing the nonprofit to identify and enlist people interested in serving on boards in the area, ESC’s new program was just what WCSG needed.

WCSG became one of the first participants to sign up. Within one month of registering on Build a Better Board, WCSG successfully recruited three new members to its board of directors.

“The timing was perfect for us,” said Marilyn Asay, president of the WCSG board. “We needed help, and we needed it like yesterday.”

WCSG knew it could count on ESC as they had recently finished a board development engagement as well. The organization has a long history, but it has been governed by an active board for only three years.

“We struggled at first,” Asay said. To grow, they needed more structured leadership. Fortunately, an ESC consultant signed on as a WCSG volunteer, which led WCSG to seek ESC’s consulting help. The work started with three ESC consultants helping the organization’s leadership to identify their needs to improve board governance procedures. The group then worked on how to improve board recruiting, and ESC guided WCSG’s board in rewriting their bylaws.

The agency’s mission, as stated in the newly revised bylaws, is to “promote and support the health and well-being of Wake County seniors through the establishment, implementation and evaluation of the annual Wake County Senior Games, consisting of artistic and athletic competition.” WCSG stages more than 30 events for residents, and the competitions are held in March and April each year. Most participants are in their 60s and 70s, with some in their 80s and even one who was 97.

The WCSG event is the second largest of 53 across North Carolina. It grew out of senior programs at the Raleigh Parks and Recreation Department, which sponsored the first games in April 1982. The program incorporated in 1990 as a 501(c)(3) nonprofit. Funding and governance in the early years came from area government agencies. The nonprofit status allowed fundraising beyond government support from corporate sponsors and individual donors and eventually led to the creation of an active board of directors.

The budget now is a little over \$17,000. About a third of that comes from contributors, and the rest comes from entry fees, which are minimal. It costs \$15 to register for three events and a dollar or two more to add other events.

WCSG now has 17 board members, 13 at large and four from local municipalities’ senior and recreation agencies. Now, Asay said, the improved and expanded board has a new goal. “We want to double or triple the number of participants in the games.”

“There have been very important, tangible results from our work with ESC,” Asay said. “We have been really pleased with the progress and the support of ESC.”



ESC is proud to announce the development and launch of Build a Better Board, a unique web-based service that matches Triangle area nonprofits with talented individuals who would like to serve in vital positions on nonprofit boards. It is easy to use and completely free of charge for both nonprofits and individuals. Similar to a dating service where you can see profiles and make contact with people you find of interest, the system matches nonprofit organizations with professionals and community leaders who may want to serve on boards in their area. Build a Better Board gained momentum quickly and has already led to successful matches.

After only six months of operation, Build a Better Board had:



100+
ACTIVE
NONPROFITS



130+
ACTIVE INDIVIDUAL
CANDIDATES



85+
OPEN BOARD
POSITIONS

MATCHING SUCCESS



"I knew I wanted to join the board of a nonprofit but had no idea where to start. Build a Better Board made it easy to connect with the local nonprofit community and find the right opportunity for me."

Steven Worsham
Assistant Vice President, Credit Suisse

**MATCHED
WITH**

"Board recruitment is an essential task. Finding the right people with the right skills and with the necessary available time is sometimes frustrating. Build a Better Board is a great time saver and obviously attracts well-qualified people."

Betsey McFarland
Executive Director, Wade Edwards Learning Lab



The system works by having nonprofits and individuals fill out a simple online profile accessed through the Build a Better Board website, listing their needs, backgrounds and preferences. Then the nonprofit, or the individual, can perform a variety of searches. Registering on the website is quick and user-friendly, so sign up today!

www.buildabetterboard.com

ESC is supported in this effort by a generous grant from Blue Cross and Blue Shield of North Carolina. Our partners in this program include: Chapel Hill-Carrboro Chamber of Commerce, North Carolina Center for Nonprofits, Triangle Community Foundation, The Triangle Nonprofit & Volunteer Leadership Center and Young Nonprofit Professionals Network Triangle NC.



2016 DONORS

2016 INDIVIDUAL DONORS

Linda Anderson	Jim and Beth Maxwell
Heather Lynn Bailiff	Ed McCraw
Elizabeth Pritchett Bass	Marcy McKaig
Allen Berk	Tom Medlin
Diana A. Bing	Jenna Meints
<i>In memory of Dr. Jerold Lawson</i>	Vic and Anne Moore
Bradfield Family	Doug and Carrie Norry
Brian and Marianne Breneman	Godfrey Pinto
Jessie Bristol	Brenda R. Pomeroy
Charles and Renee Brown	Dave and Sara Pottenger
Dave and Terri Buchanan	Morgan Quattlebaum
Linda Charlton	Ed Rose
Tom and Cathy Cogswell	Harold G. Sellars
Janet Colm	Sarah and Rob Shapard
Perry Colwell	Ilona Sher
Jean Taylor Cox	Trudy and Stuart Smith
G. Lee Fogle	Loretto Boswell Sognier
Denise Frizzell	Don and Sue Tiedeman
John Gabor	George B. Tremmel
Dave and Liza Gettles	Mike Trudnak
Edward M. Haugh Jr.	Nic Versmissen
David and Mollie Hodl	Wallace Family Donor Advised Fund
Marcia Jaquith	Ken and Carol Waters
Samantha and Brad Johnson	Darlene and Don Wells
Thad Juszcak	Stacy West
Judy and Fred Kelly	George Williamson
James and Cynthia Kinney	Joel Zimmerman
Craig and Cindy Landwehr	Arthur and Betty Zucker
Marilyn and Doug Longman	
Linda and Mark Luftig	

2016 FOUNDATION & CORPORATE DONORS

BIN Charitable Foundation, Inc.
Blue Cross and Blue Shield of North Carolina
Fox Family Foundation, Inc.
Morgan Stanley
Strowd Roses, Inc.
Town of Chapel Hill
Wells Fargo

"Strowd Roses, Inc., looks at our grants made to ESC as a win-win. Our funds have not only built ESC's own capacity to do good work locally but have strengthened the capacity of several of our other grantees by providing sponsorships to receive ESC executive coaching, retreat facilitation and board development services. Our own organization has sought out ESC for consultation and firmly believes that stronger nonprofits mean stronger communities. ESC is a part of that broader vision."

-Eileen Ferrell

Executive Director, Strowd Roses, Inc.

"We have been pleased and proud to support ESC for a number of years and expect to continue doing so in the future. Our exposure to ESC began many years ago through our service on other boards that had chosen to engage ESC's services. Through this, we came to appreciate the benefits of the objective, thoughtful guidance offered by ESC's consultants. Viewing ESC through the eyes of the client provided us with a unique and valuable perspective. We are also motivated by the leverage offered through giving to ESC. We know that our gifts to this one organization will allow for expertise to be delivered across a wide spectrum of local nonprofits, thereby improving the quality of many lives throughout our community."

-Dave and Sara Pottenger

ESC Board Family

2016 CLIENTS

HEALTH CARE, MENTAL HEALTH & WELLNESS

A Helping Hand
Alliance Medical Ministry
American Cleft Palate-Craniofacial Association
Blue Cross and Blue Shield of North Carolina
Blue Cross and Blue Shield of North Carolina Foundation
Center for Child & Family Health
Center for Psychological and Family Services
Club Nova
Community Health Coalition, Inc.
HD Reach
Hemophilia of North Carolina
Hilltop Home
JUST **TRYAN** IT
North Carolina Society for Clinical Social Work
Orange County Health Department
Piedmont Health Services, Inc.
Vaccine Ambassadors

YOUTH & EDUCATION

Augustine Literacy Project
Big Brothers Big Sisters of the Triangle
Book Harvest
Chapel Hill-Carrboro Public School Foundation
Communities in Schools of North Carolina
Crayons2Calculators
Durham Public Schools Scholarship Foundation
Exchange Family Center
Girls on the Run of the Triangle
Immersion for Spanish Language Acquisition (ISLA)
International Montessori School
Life Skills Foundation
The Philharmonic Association, Inc.
Raleigh Boychoir
SKJAJA Fund
Willow Oak Montessori Foundation

ARTS, CULTURE & HUMANITIES

Artspace
CAM Raleigh
Cary Playwrights' Forum
Chamber Music Raleigh
Chapel Hill Philharmonia
Hayti Heritage Center
Walltown Children's Theatre

HUNGER & HOMELESSNESS

Chapel Hill-Carrboro Meals on Wheels
Families Moving Forward
Families Together
Housing for New Hope
Stop Hunger Now
Women's Center of Wake County

PUBLIC & SOCIETAL BENEFIT

Campus Y
Chapel Hill-Carrboro Chamber of Commerce
Johnson Service Corps
Triangle Community Foundation
Working Landscapes
Young Nonprofit Professionals Network Triangle NC

SENIOR LIVING

Durham Center for Senior Life
Farrington Cares
Wake County Senior Games

ENVIRONMENT

Eno River Association

FAITH-BASED

Alamance-Orange Prison Ministry

OTHER HUMAN SERVICES

AIDS Community Residence Association
Compass Center for Women and Families
Durham Crisis Response Center
The Family Violence Prevention Center, Inc.,
DBA InterAct
Orange County Disability Awareness Council
StepUp Ministry
Wheels4Hope
White Oak Foundation, Inc.

ESC STAFF & BOARD

2016 ESC BOARD OF DIRECTORS

Dave Pottenger, <i>Chair</i>	Craig Landwehr
George Williamson, <i>Vice Chair</i>	Elizabeth Pritchett
Harold Sellars, <i>Secretary</i>	Mike Trudnak
Morgan Quattlebaum, <i>Treasurer</i>	Stacy West
Heather Bailiff	
Nick Bradfield	Non-Voting Members:
Samantha Bureau-Johnson	Abdullah Alrashid
Linda Charlton	Jessie Bristol
Jean Cox	William Martin

2016 ESC CONSULTANTS

Sue Adams	Linda Luftig
Linda Anderson	Mark Luftig
Paul Bamford	Rick Matson
Diana Bing	Ed McCraw
Kathy Bovard	Marcy McKaig
Brian Breneman	Tom Medlin
Charles Brown Jr.	Jenna Meints
George Cahill	Verona Middleton-Jeter
Dick Cashwell	David Miller
Janet Colm	Rusty Myer
Perry Colwell	Jack Nagy
Tena Crook	Jenny Ocasio-Merrill
Sholeh Dadressan	Steve Owen
Paul D'Angelo	Godfrey Pinto
Al Decker	Brenda Pomeroy
Kathy Doherty	Elizabeth Preddy
Gail Ferreira	Tommy Re
Lee Fogle	Tanya Rhone
Michael Friedman	Greg Roper
Michael Frisch	Ed Rose
Denise Frizzell	Matt Runci
John Gabor	Marty Saffer
Ed Gawf	Ilona Sher
Dave Gettles	Steve Smith
Steve Hall	Melissa Staples
Bobbi Hapgood	Jeff Swain
Tom Hardy	Don Tiedeman
Ed Haugh Jr.	George Tremmel
Scott Heyman	Nic Versmissen
Doug Hurley	Bill Wallace
Marcia Jaquith	Ken Waters
Bill Jones	Lee Watkins
Thad Juszcak	Jonathan Whaling
Judy Kelly	Michael Williams
Jim Kinney	Joel Zimmerman
Wendy Kuhn	Arthur Zucker
Marilyn Longman	

ESC STAFF



Trudy Smith
Executive Director



Kate Parker
Director of Internal Operations



Anne Saffer
Director of Consultant Development

ESC SERVICES

BOARD DEVELOPMENT

We help your board increase its effectiveness in such areas as roles and responsibilities, membership, organization and operations.

RETREAT FACILITATION

Customized, one-day retreats help your board or staff members understand their roles, plan for the future and address specific challenges facing your organization.

GUIDED ORGANIZATIONAL ASSESSMENT

We help you identify your organization's strengths and challenges in meeting nonprofit best practices and help you to develop a plan to improve.

STRATEGIC PLANNING

Using a structured process, we guide you in developing specific plans to meet the mid- and long-term goals of your organization.

EXECUTIVE COACHING

A specially trained, experienced coach develops a one-on-one, confidential relationship with your executive to achieve impressive results.

COMMUNICATIONS/MARKETING

We help you improve your visibility and impact with key audiences and constituencies.

FINANCIAL ASSESSMENT

A financial expert can assess your financial reports and processes and make recommendations for your consideration.

COLLABORATION OPPORTUNITIES

We help you examine collaboration opportunities with other local nonprofits, from sharing programs, services, development, advocacy, staffing and locations all the way up to merger explorations and transitions.

BOARD MATCHING

Nonprofit Speed-Dating:

In-person matching events link nonprofits and those wishing to serve on a nonprofit board.

Build a Better Board:

Our web-based matching service connects nonprofit boards with leaders wishing to serve on them.

www.buildabetterboard.com

ADDITIONAL SERVICES

We can help with human resources issues, fundraising planning, process mapping and crisis management.

For a no-cost, in-person consultation, please contact:

Executive Director Trudy Smith: trudy@esctrangle.org



Executive Service Corps
of The Triangle