

2011 COMMUNITY REPORT

Making a Difference



ESC

Executive
Service
Corps
of The Triangle

PROFESSIONAL
AFFORDABLE
CONSULTING FOR
NONPROFITS

December 2011

TO: ESC of The Triangle,

I first heard of ESC at a Chapel Hill Carrboro Chamber of Commerce meeting and immediately made contact. ESC is simply an unbelievably great organization, mission and staff!

We have used ESC for several projects including Leadership Coaching, Strategic Plan Facilitation, and Organizational Development.

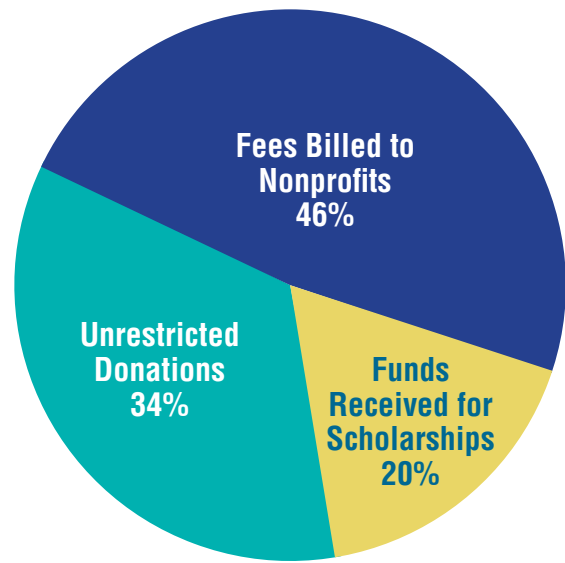
I am especially impressed with how ESC is thoughtful and deliberate in matching an organization's culture and skills with the best staff member to optimize outcomes. The approach to customer service is much more than a platitude and is even more remarkable given the incredibly discounted service that non-profits receive from this valuable resource.

It is rare to find a mission-driven organization that lives up to its own PR; it is even rarer to find an organization that surpasses expectations. ESC has always delivered more than promised and I am honored that they have worked with us, and know that they have absolutely helped Piedmont Health Services be better than we have ever been.

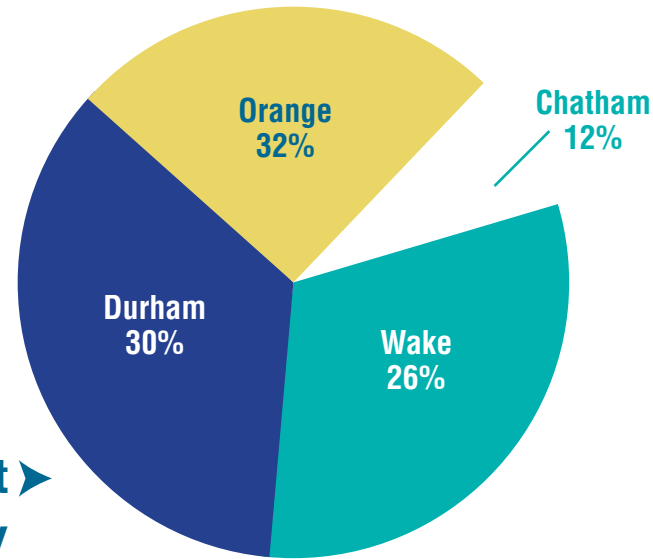
My best advice to anyone considering using ESC - which I think is the best secret for non-profits in the Triangle - is to stop thinking and get going. You and your organization will be better for it.

Respectfully Submitted,

Brian Toomey
CEO/President, Piedmont Health



Revenue By Source



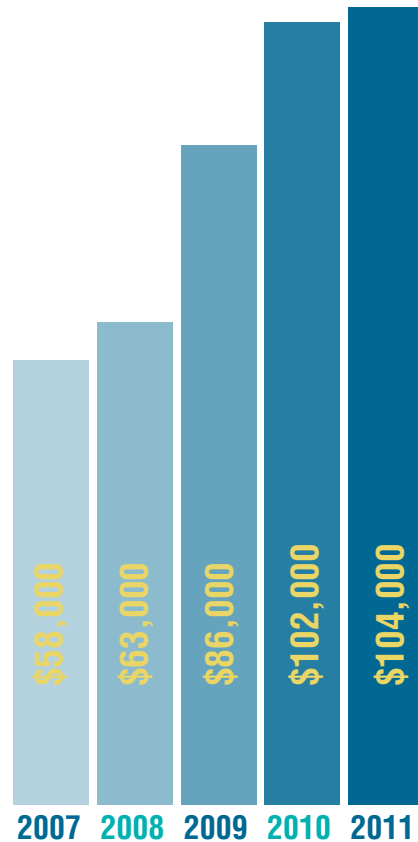
Engagement By County

Engagement By Category

Board Development and Retreats	39%
Coaching	32%
Strategic Planning	12%
Human Resources/Custom	11%
Fundraising/Communications	3%
Organizational/Financial Assessments	3%

Client Size

0 - \$100,000	15%
\$100,001 - \$250,000	17%
\$250,001 - \$500,000	19%
\$500,001 - \$1,000,000	17%
over \$1,000,000	27%
undetermined	5%



Total ESC Income by Year



To Our Stakeholders:

We are very proud of our efforts this past year to make a difference for the organizations we serve and the communities we support. We believe we are making a difference throughout the Triangle by helping nonprofits achieve their missions.

We help generate solutions that solve problems or address issues that arise in organizations. In 2011, we completed 57 consulting assignments for our clients, made possible in part by the generous financial grants from 7 local foundations.

Our strong results were achieved through the generous donation of time by our 35 pro bono consultants who provide our clients with professional consulting services that are tailored to meet their individual needs.

In addition, our Triangle BoardConnect service helps connect nonprofits with outstanding area professionals and executives seeking to share their time and talent by becoming a member of a Board of Directors. In 2011, our “board matchmaking” website of 492 candidate profiles was available to Triangle nonprofits seeking to fill some 358 open Board positions.

2011 marks our 25th anniversary of service. While our early efforts were modest in scale, our organization has grown to enable us to positively impact organizations in all four local counties; and we continue our reputation for quality consulting and professionalism.

In 2011, we sensed a need for greater collaboration among nonprofits as the economic downturn continued to affect most nonprofits’ missions and critical funding of their good work. To validate this need, we surveyed Triangle nonprofits on their collaboration needs, and organized the first community-wide meeting on collaboration. We are proud of these initial steps, and see great promise in helping organizations learn more about the collaboration process.

We are also fortunate to have 4 new directors join our Board this past year. These committed and talented community leaders enhance our already strategic Board, one that can provide the leadership and governance needed for the future.

In this report, we have highlighted a few of our client successes in order to provide you with a better sense of the range of services we provide and the results we achieve. Please take a moment to read these stories and celebrate these success stories.

We are proud of our work and proud to be making a difference in the Triangle!

Trudy Smith
Executive Director, ESC of the Triangle



Trudy Smith
Executive Director

Executive Director Trudy Smith has been with ESC for 6 years—expanding the number of clients served, the number of pro bono consultants engaged and the number of services offered. Her goal is to reach as many nonprofits as possible to help them become more efficient and more effective.



BOARD RETREAT FACILITATION

Woods Charter School

Founded in 1998, Woods Charter School is a grade K-12 public school located in Chatham County. Today, the school is proud of its 95 percent graduation rate and its ranking for SAT scores among the “top ten” schools in the entire state.

When Harrell Rentz became principal of the school a few years ago, the organization had just moved into its new facility. “Our feeling was that Woods Charter School was very good, but could become great,” Rentz said. “Since so much of the Board’s energy had gone into building the new facility, it was time to step back and begin thinking about our future and where we wanted to take the school next.”

Rentz engaged ESC to conduct a Board of Directors retreat to begin the process of envisioning what the school could become, and also further develop the board through the formation of committees to help with the overall work and governance.

“The result of that first Board retreat was so successful,” Rentz said, “that we engaged ESC to do an additional retreat one year later. We felt that the ESC consultants had done a great job in helping us with our committee structure and direction the first time, and we knew they could help us again as we began to address our mission and vision issues.”

Rentz praised the professionalism of the consultants, describing them as efficient, flexible and knowledgeable. “They came in with great ideas, but also were good at listening to us and tweaking their ideas to make it work best for us. I think our Board was already very effective and functional, but they helped us get to the next level.”

Rentz and the Board also felt that it was valuable to have consultants from outside the culture of the organization come in to help with the process, individuals with no agenda who could challenge group thinking.

“I would highly recommend ESC to any nonprofit because of the quality of work and their incredible value,” added Rentz. “In fact, we have just engaged ESC for a third project to help us with our strategic direction.”



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Harrell Rentz, Principal, Woods Charter School



“I thought the ESC consultants were very skilled at leading us through this planning, but yet were flexible to meet our special needs.”

Lori O’Keefe, Vice President for Philanthropic Services and COO, Triangle Community Foundation



STRATEGIC PLANNING

Triangle Community Foundation

As the Triangle Community Foundation neared the end of its five-year strategic plan, the Board and leadership team wanted to ensure that the next strategic plan would address all of the future needs of the organization as well as put in place key objectives and measurements to ensure the organization was on the right track.

The Triangle Community Foundation turned to ESC for help. “We thought it would be valuable to have an outside group help us with this process,” said Lori O’Keefe, Vice President for Philanthropic Services and COO of the organization. “ESC has a great framework for the strategic planning process that is very effective for most organizations. ESC also offered us a more objective perspective as we discussed critical issues and developed plans.”

The Triangle Community Foundation was founded in 1983 to create positive change through community-based philanthropy. The Foundation’s mission is to enhance the lives of all Triangle residents by building philanthropic assets, connecting resources with needs and providing leadership on key community issues and opportunities.

To help the Foundation through the planning initiative, ESC used its strategic planning process which includes: developing or reviewing the mission statement and vision; conducting an environmental scan of key constituencies and external trends; doing an analysis of strengths, weaknesses, opportunities and threats; defining critical issues; and developing strategic goals, action plans and measurements.

“I thought the ESC consultants were very skilled at leading us through this planning, but yet were flexible to meet our special needs,” added O’Keefe. “The consultants were very professional, and knew when to push us and also when to step back and let us lead.”

In addition to utilizing the services of ESC, the Triangle Community Foundation is a major funder of ESC activities. “We highly recommend ESC to nonprofits to help them with a variety of issues, including strategic planning,” added O’Keefe. “We believe that ESC’s sweet spot is helping small- to middle-size nonprofits, although their process is valuable for larger, more complex organizations as well. We are pleased to fund ESC and view these grants as some of our most successful.”



ORGANIZATIONAL ASSESSMENT/ STRATEGIC PLAN

The Lucy Daniels Center

The Board of the Lucy Daniels Center was committed to developing a long-term strategic plan. But before beginning that activity, the Board felt that it needed a broad and comprehensive organizational assessment of strengths and weaknesses.

“Our Board felt strongly that this assessment should be done first, and it would provide a structure for the strategic plan to follow,” said Donald Rosenblitt, M.D., who serves as the Clinical and Executive Director of the Center.

Dedicated to helping children live emotionally healthy lives, the Lucy Daniels Center has grown to be the largest nonprofit provider of mental health services exclusively for children in the Triangle, serving more than 600 children and their families annually. The Center is both a community clinic and a highly sophisticated assessment and treatment facility.

The organizational assessment process was completed in approximately three months. ESC was then engaged to lead the development of a five-year strategic plan, which has since been completed as well.

“The organizational assessment which ESC produced turned out to be a very valuable document that we have used in our subsequent thinking and planning,” Rosenblitt explained. “The four or five most important issues identified in the assessment were specifically addressed in our new strategic plan. While these issues were not new to us, it was valuable to have external consultants identify these issues in very clear and precise terms, and challenge us in some areas.”

Rosenblitt had high praise for the consultants involved in the assessment and strategic planning. “I was impressed by how savvy they were, and how quickly they were able to get up to speed on our organization with its many complexities. In addition to being very capable, I appreciated the fact that they were also very respectful of our organization and people, and were committed to a collaborative process.”

Rosenblitt has also asked ESC to help with communications and fundraising planning as well. “Without hesitation, I would recommend ESC to other nonprofits,” Rosenblitt added. “The value received for the very modest fee is just tremendous.”



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Donald Rosenblitt, M.D., Clinical and Executive Director, Lucy Daniels Center



2011 Clients

Arts & Culture

ChathamArts
International Focus, Inc.
The Durham Arts Guild

Associations/Foundations

Triangle Community Foundation

Children/Youth & Education

Art Center
Casa Esperanza Montessori Charter School
Chatham County Together!
Children’s House Montessori
i4m - innovation for motivation
International Montessori School
KidZNotes
Learning Together, Inc.
North Carolina Society of Hispanic Professionals
Project Enlightenment Foundation
Woods Charter School

Community Improvement

Chatham County Economic Development Corporation
Sister Communities of San Ramón, Nicaragua
Southeastern Efforts Developing Sustainable Spaces
Strowd Roses, Inc.

Health Care/Mental Health

American Cleft Palate-Craniofacial Association
Lucy Daniels Center
Mental Health America of the Triangle
North Carolina Therapeutic Riding Center
North Carolina Community Health Center Association
Piedmont Health Services, Inc.
SECU Family House at UNC Hospitals
The Arc of Durham County
The Arc of Wake County, Inc.

Social Services

Club Nova
Durham Affordable Housing Coalition
Durham Center for Senior Life
Freedom House Recovery Center
Genesis Home
Meals on Wheels of Durham, Inc.
Meals on Wheels of Wake County
North Carolina Center for the Care of Huntington’s Disease
Planned Parenthood of Central NC
St. Paul’s Center for Health and Healing
Urban Ministries of Durham

Other

Neuse River Golden Retriever Rescue



Major Donors

The BIN Foundation

Michael Warner and Betty Craven Fund

The Mary Duke Biddle Foundation

BlueCross BlueShield of North Carolina

Durham Merchants Association
Charitable Foundation

The Fox Family Foundation

Maxwell, Freeman & Bowman, P.A.

Strowd Roses Inc.

Triangle Community Foundation

The Wells Fargo Foundation

Staff

Trudy Smith – Executive Director

Kate Mazza – Associate Director

Terri Buchanan – Administrative Professional

Consultants

ESC consultants bring years of experience from the business and public sectors. Every one a volunteer, they come from a variety of backgrounds, including finance, nonprofit management, marketing, strategic planning, human resources, project management and sales. All have a lifetime of valuable experience and are trained to understand the unique requirements of the nonprofit sector.

Board

Beth Maxwell – Chair

Dave Gettles – Vice Chair

Don Wells – Secretary

Thomas Cogswell – Treasurer

Laura Benson

Allen Berk

Perry Colwell

Joe Glasson

Bonnie Gordon

Gracie Johnson-Lopez

Linda Luftig

Melissa Martin

Ed McCraw

Dave Pottenger

Josh Ravitch

Harold Sellars

Fred Stang

Judy Wilson-Kontny

SERVICES

Board Development

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

Board Retreat Facilitation

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

Management Check-up

Identify your organization's strengths and challenges in meeting nonprofit best practices and 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.

Triangle BoardConnect

We connect nonprofit boards with new leaders. We offer a convenient no-cost way to match nonprofit organizations with potential board members interested in board service or committee membership.

Collaboration Opportunities

Explore opportunities to collaborate with other local nonprofits in areas such as sharing development, advocacy, programs and services, staffing and locations, all the way up to merging organizations.

Additional Services

We can help with Human Resources Issues, Organizational Assessment, Crisis Management and Fundraising Planning.



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For a no-cost, in-person consultation, please contact Executive Director, Trudy Smith.

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ESC is a registered 501 (c)(3) organization.