

2012
REPORT
TO THE
COMMUNITY

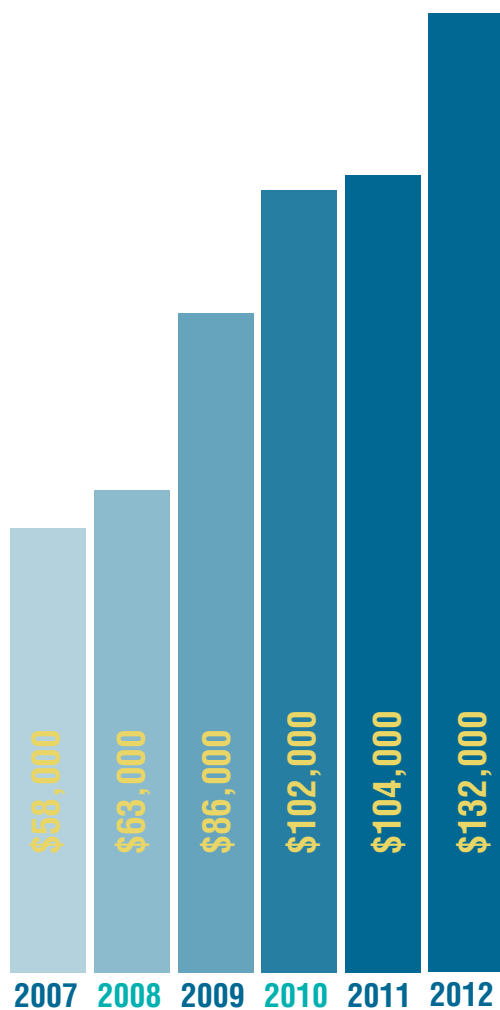
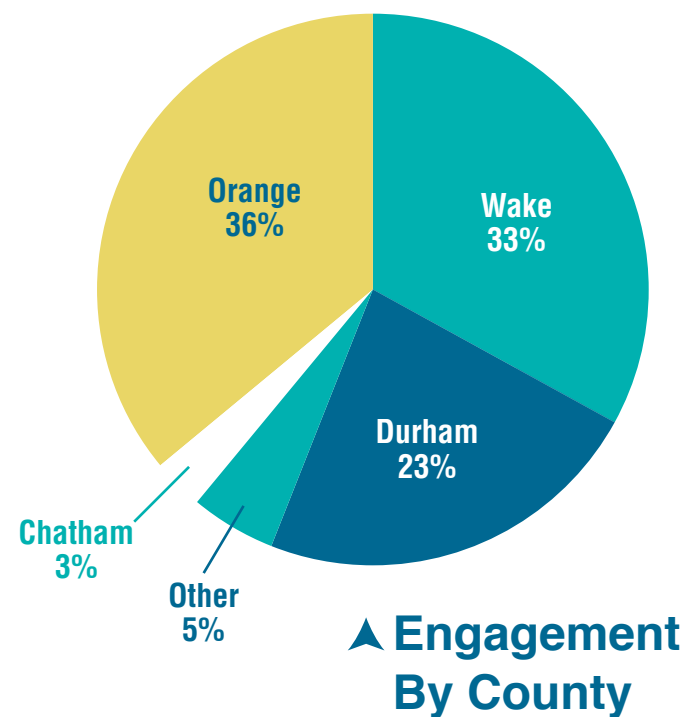
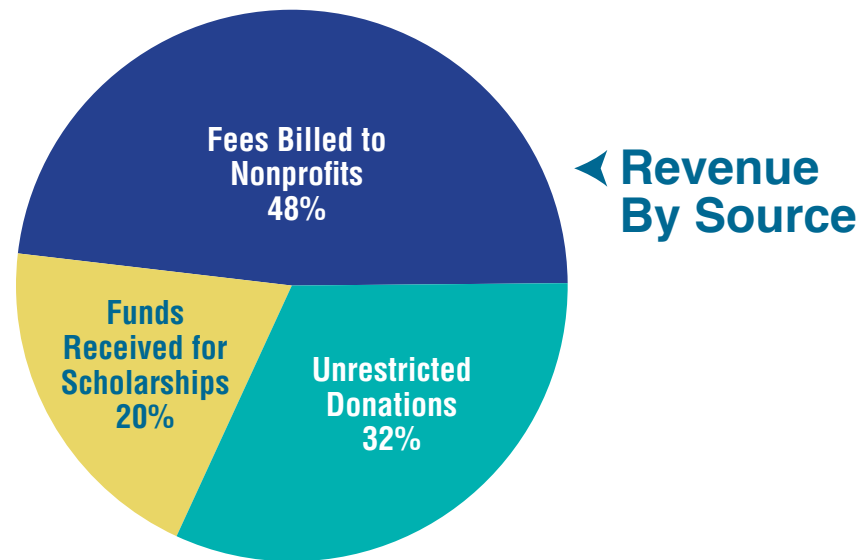


ESC

Executive
Service
Corps
of The Triangle

PROFESSIONAL
AFFORDABLE
CONSULTING FOR
NONPROFITS

**25 YEARS
OF MAKING
A DIFFERENCE**



Client Size

0 - \$100,000	16%
\$100,001 - \$250,000	3%
\$250,001 - \$500,000	16%
\$500,001 - \$1,000,000	20%
over \$1,000,000	35%
undetermined	10%



To Our Stakeholders:

In 2012, we celebrated our 25th year of serving the nonprofit community in the Triangle. We are very proud of our ongoing efforts over the years. We plan to continue to make a difference in the organizations we serve, and the communities we support.

In November, we held a seminar and celebratory event to mark our anniversary. In the seminar, five talented members of the ESC family gave presentations that included 25 tips to help nonprofits improve their organization and efficiency. We saw this event as another way we can offer our expertise to help nonprofits fulfill their missions.

We are also very proud of all we accomplished in 2012. We completed 75 consulting assignments for our clients, an increase of 32 percent over the previous year. This was made possible in part by financial grants from 5 local foundations.

Our strong results were achieved through the generous donation of time by our 43 pro bono executive consultants who provide our clients with professional consulting services, tailored to meet their individual needs.

In addition, our Triangle BoardConnect service helped 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 2012, our “board matchmaking” website of 500 candidate profiles was available to Triangle nonprofits seeking to fill some 367 open Board positions.

In 2012, we began offering a new program called the Management Checkup. This analytical “tool” enables a nonprofit to evaluate and assess the state of its policies and practices relative to a set of nonprofit best practices. With recommendations in hand from the Management Checkup, an organization can create a practical plan to improve its performance in key areas, including board governance, planning, financial oversight, financial support, operations, and human resources practices.

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. We hope you will take a moment to read these stories and learn more about these fine organizations.

We are proud of our 25-year history, and are looking forward to serving this community in the future through expanded programs and offerings. We begin our second 25 years with a new strategic plan to give us a blueprint for the future. We are happy to offer professional, affordable consulting to the nonprofit community.

Most of all, we are proud to call the Triangle home, and we at ESC are committed to making a difference here!



Trudy Smith
Executive Director

Executive Director Trudy Smith has been with ESC for seven years—expanding the number of clients served, the number of pro bono consultants engaged and the number of services offered. Trudy’s goal is to broaden ESC’s reach to Triangle nonprofits, such that ESC is a recognized leader as an affordable resource for our community.

Trudy Smith

Trudy Smith
Executive Director, ESC of the Triangle



MANAGEMENT CHECKUP Dorcas Ministries

Dorcas Ministries, based in Cary, is reexamining its mission and its services. In the past it has provided residents of its service area with emergency assistance to meet their essential human needs, including shelter, clothing, food, fuel, transportation and medical care. This care is enhanced with childcare and educational assistance scholarships.

Howard Manning, the organization's Executive Director, explained that the organization now wants to increase its value by helping people become more self-reliant. New services include financial counseling, budgeting and a "jobs for life" training program. "We will always be there for people in need, but we want to help people become successful in life so they don't need our services on an emergency basis."

This enhanced mission has increased the need for enhanced fundraising, as well as additional space for new services. The organization was able to move into new facilities in 2011, effectively doubling its space.

"Given this level of change, we believed we needed some outside help and guidance," Manning said. "We turned to ESC for its evaluation skills and management know-how."

A BEST PRACTICES APPROACH

Dorcas Ministries contracted with ESC for its new Management Checkup program. Using this tool, ESC consultants can evaluate an organization's policies and practices, assess an organization's current status, and help develop a plan to make improvements, all based on best practices.

The checkup covers six areas: Board Governance, Planning, Financial Oversight, Financial Support, Human Resources, and Operations and Quality.

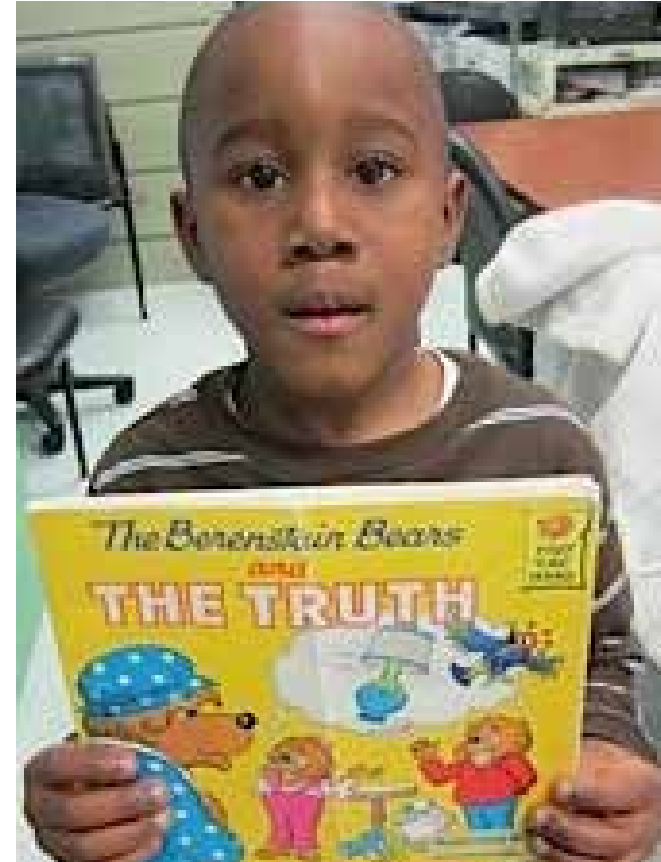
"This tool provided us with a clearer idea of our strengths and weaknesses so that we can honor our past while embracing the future," Manning said. "As a direct result of the ESC analysis, we made a number of changes to our Board structure, creating new committees and consolidating others. We also created a new Resource Development Committee that is going to pay huge dividends for us in the area of fund raising and other needs. And we made changes to our HR practices."

FLEXIBLE CONSULTANTS

Manning found the ESC consultants helpful throughout the process. "They were sensitive to our needs and uniqueness, offering very professional advice but remaining flexible with us. I would recommend ESC to any nonprofit that is going through change."



"I would recommend ESC to any nonprofit that is going through change."
Howard Manning, Executive Director, Dorcas Ministries



"I felt that our consultants took our concerns very seriously and were there for us at every step."

Ginger Young, Executive Director, Book Harvest



FINANCIAL MANAGEMENT AND BOARD RETREAT Book Harvest

Leaders of nonprofit organizations often approach ESC when they enter particularly challenging times, and sometimes those times can result from their rapid success in meeting a need in the community.

Ginger Young founded Book Harvest in the Triangle because she had identified a way to enrich the lives of local children. "Many research studies have shown that children who are brought up in homes with books are far more likely to succeed academically than those in homes with no books," Young said. "Without early exposure to books in the home, children often struggle at school and in later life."

Young created Book Harvest to enable Triangle children living in poverty to grow up in a book-rich home environment. She began by collecting new and gently used books from families whose kids had outgrown them, and then distributing these books to kids in need. The model met with success almost immediately.

"I had intended to spend a good part of my first year simply trying out my idea," Young explained. "I just didn't expect the deluge of books that I received or the huge numbers of requests for them. After nine or ten months, I sat down with ESC to talk about how to make sure that Book Harvest had the infrastructure it needed in place to make it last."

DEVELOPING FINANCIAL ACUMEN

ESC recommended that Young and her board focus on ensuring the financial stability of the organization while also engaging in communications and board development work, and went on to work with Book Harvest on two engagements during 2012.

"Our first engagement with ESC really helped to put us on a sound financial footing," said Young. "Because of the work we did with our consultant, we now receive professional financial services and reports, and we have recruited a key new board member as Treasurer and Chairman of our Finance committee. ESC could not have been more professional or responsive to our concerns."

FACILITATING A BOARD RETREAT

In addition, ESC helped Book Harvest to organize and facilitate a board retreat that aimed to clarify the organization's long-term dreams and its message to stakeholders. The ESC consultants helped coach and facilitate the Board Retreat, where the Board gained clarity about the organization's vision and renewed confidence in its ability to succeed.

"The generous and effective way in which our consultants shared their insights and wisdom helped set the stage for success," Young said. "I felt that our consultants took our concerns very seriously and were there for us at every step."



STRATEGIC PLANNING

The North Carolina Symphony

When the North Carolina Symphony played on the lawn to a full house in an Orange County neighborhood in the spring of 2011, many people could hear the music all the way down the hill --- and long after the musicians left it seemed that they could still hear it reverberating in the air. Its music was “bold, exhilarating, romantic and powerful,” just as the symphony’s tagline promised. It left them wanting more.

Since 1932 the symphony has provided the highest caliber of live music in every corner of the state. It has evolved to a 65-member orchestra with a budget of about \$11 million and a mission that entails serving all of North Carolina. The musicians perform over 175 concerts in more than 50 counties and at schools across the state. It is considered, by the News & Observer, as “one of the state’s most treasured cultural institutions.” But it didn’t achieve this status easily. Its successes were strategic and planned by several groups led by its leaders and board members.

BEGINNING A NEW PLANNING PROCESS

So when Sandi Macdonald was hired in 2011 as the symphony’s new chief executive officer and president, one of her first tasks was to lead an effort to develop a five-year strategic plan since the current plan was scheduled to expire. She turned to the Executive Service Corps of the Triangle (ESC) to facilitate the planning process.

“This is a highly complex institution and I needed to bring together a large number of individuals from every corner of the state for their input into the planning process,” Macdonald said. “To facilitate these conversations we turned to our ESC consultants for guidance.”

The consultants recommended she consider using a “blueprint,” which was an illustrated outline of the strategic planning process. It had been created and updated over the years by ESC’s consultants based on their decades of experience facilitating these processes. “We used this blueprint as our guide,” Macdonald said. “By partnering with ESC we were able to customize the process which is exactly what we needed. I cannot overestimate the role the ESC consultants played in this process. They were very sophisticated partners and provided me with the resources beyond that which I could afford.”

Now, in its 80th year as a cultural institution for North Carolina, the symphony’s next five years will be about continuing to excel in making great music -- and making it come alive everywhere.



“They were very sophisticated partners and provided me with the resources beyond that which I could afford.”

Sandi Macdonald, CEO and President,
The North Carolina Symphony



PHOTOS BY MICHAEL ZIRKLE



“I needed advice and counsel on how best to lead a small organization with limited funds and a hard working staff.”

Sheridan van Wagenberg, Executive Director,
Caring House



EXECUTIVE COACHING

Caring House



Caring House in Durham provides comfortable, supportive, and affordable housing to Duke Cancer Institute’s adult outpatients and their caregivers. Providing a calming refuge for those battling cancer, the facility has 18 private rooms with a private bath, phone, television, and DVD player. Patients are encouraged to bring their caregivers, which may be a spouse, other family member or close friend.

When Sheridan van Wagenberg joined Caring House as its Executive Director, she was faced with a double challenge that many area nonprofits have: the tough economy was increasing the need for its services while fundraising was challenged by individual and corporate cutbacks in donations.

Sheridan also had a number of other specific challenges: she had spent twenty years in the corporate world but was new to a nonprofit leadership position. And she had to find creative ways to motivate and reward a small hard-working staff and volunteer group who often had to cope with difficult emotional situations.

PROVIDING PERSPECTIVE AND GUIDANCE

“I turned to ESC for guidance,” said van Wagenberg. “I needed to understand the proper roles and responsibilities of the board, staff and executive director position. I needed advice and counsel on how best to lead a small organization with limited funds and a hard working staff.”

The Executive Coaching program offered by ESC consists of a confidential one-on-one relationship between an Executive Director and a specially trained ESC coach. The coach acts as an impartial sounding board to help leaders think through problems and make informed decisions.

A REWARDING EXPERIENCE

“My experience with ESC has been excellent,” van Wagenberg explained. “My coach served as a senior nonprofit leader in both an executive director position as well as a board member position. With that experience, she was able to provide me perspective and guidance from two points of view. My coach helped me determine how our board could be best organized, and as a result, how to work towards a number of new ways to structure our board committees. I also learned how to better work with individual board members in order to reach full potential through a defined process and better communication. Her insight was extremely valuable and worthwhile.”

Van Wagenberg highly recommends this service to other executive directors. “Nonprofit leaders with less than five years of experience should absolutely enroll in this Executive Coaching program. Nonprofit leaders with greater than five years of experience should enroll as well. They will gain a fresh perspective and new insights into their organization.”

Foundation and Corporate Donors

The BIN Foundation
 BlueCross BlueShield of North Carolina
 The Fox Family Foundation
 Maxwell, Freeman & Bowman, P.A.
 Mechanics and Farmers Bank
 North Carolina Mutual Life Insurance Company
 Piedmont Investment Advisors, LLC
 Strowd Roses Inc.
 Triangle Community Foundation
 The Wells Fargo Foundation



Lori O'Keefe
 President



Profile of a Foundation Donor: **TRIANGLE COMMUNITY FOUNDATION**

A generous supporter of ESC, The Triangle Community Foundation manages nearly \$150 million in over 750 funds established by families, businesses, individuals and organizations, mainly for the benefit of Wake, Durham, Orange and Chatham counties. The Foundation makes grants from those funds to nonprofits and administers a broad range of programs to benefit the community.

In addition to grant making, The Triangle Community Foundation has a strategic mission to bring the community together to help fix its most urgent problems.

As Lori O'Keefe, President of the Foundation, said, "The Triangle is blessed, but it also faces serious challenges. A top priority for us is to be a "connector" between nonprofits and resources in the community to help make the Triangle a better place to live and work. That is one of the key reasons we view ESC as a strategic partner and support the organization financially. We appreciate and respect the powerful intellectual capital and services that it offers, and are pleased to help connect ESC to nonprofits in need of these services."

"We know that nonprofits want to find ways to improve their infrastructure, enhance their financial sustainability and increase efficiencies in order to meet the increasing needs of our community," O'Keefe continued. "ESC can help organizations do all of those things."



Profile of an Individual Donor: **DIANA BING**

A 20-year resident of Raleigh, Diana Bing retired after a distinguished career with IBM four years ago. Today, she does consulting for a number of business clients, and also provides consulting services for nonprofits through ESC.

"I like providing all of my pro-bono consulting through ESC because of the quality of the organization and the chance to work with other professionals in a collegial relationship," Bing said. "I believe ESC is dedicated to excellence and I like working with like-minded individuals who really want to make a difference."

Diana has been a generous financial contributor to ESC as well. "I encourage people to donate to ESC because of the quality of the work," Bing continued. "I see so many great nonprofits that are doing wonderful work but are financially challenged. I know that ESC can provide significant help to them at a minimum cost. Because our consultants provide their services for free, I know that any financial contribution I make to ESC is worth exponentially more."

"I plan to continue giving to ESC because I believe in the work that is being done," Bing added. "I want to see the good work continue."

Diana Bing



Individual Donors

Mary Alexion
 Robin Barefoot
 Laura Benson and Walt Sliva
 Arnold Benton
 Allen Berk
 Diana Bing
 Stewart Bray
 Sam and Nancye Bryan
 Terri and Dave Buchanan
 Norman Budnitz
 William and Anne Burch
 George Cahill
 Bonnie and Bill Chameides
 Tom Cogswell
 Perry Colwell
 Paul D'Angelo
 David L. Dodson
 Kathy Doherty
 Gail Ferreira
 Aubrey Fletcher
 Isabel Geffner
 David Gettles
 Joe Glasson
 Bonnie Gordon
 J. Eugene Haas
 Michael Hanas
 Edward Haugh, Jr.
 Mary and Haywood Holderness
 Marcia Jaquith
 Gracie Johnson-Lopez
 Thomas Keller
 Judy Kelly
 James Kinney
 Betty Ann Knudsen (Estate)
 Nick Kredich
 Joan S. Lipsitz
 Marilyn Longman
 Linda and Mark Luftig

Melissa Martin
 Beth and Jim Maxwell
 Eileen McAvoy
 Ed McCraw
 Alison McEwan
 Thomas Medlin
 Peter and Prue Meehan
 Burnett and Nancy Miller
 Robert Minnear
 Anne and Victor Moore
 Kathryn Moore-Hughes
 Cécile Noël
 Suvendu Pal
 Brenda Pomeroy
 David and Sara Pottenger
 Elizabeth Preddy
 Josh Ravitch
 Carol Reuss
 Edward Rose
 Laura Rosenthal
 Harold G. Sellars
 Trudy and Stuart Smith
 Loretto Sognier
 Fred Stang and Claire Lorch
 Gary Starr
 Jeffrey Swain
 Donald Tiedeman
 George Tremmel
 Julian Wachs
 Ethel Weinberg
 Darlene and Don Wells
 Judy Wilson-Kontny
 Stephan Wittkowsky



2012 Clients

Arts & Culture

Girls Rock NC
InHerit
National Humanities Center
North Carolina Symphony

Associations/Foundations

Falconbridge Village Association, Inc.
Triangle Community Foundation
Volunteer Center of Durham

Children/Youth & Education

Agape Corner Boarding School
Alice Aycock Poe Center
for Health Education
The ArtsCenter
Book Harvest
Child Care Network
Dress for Success Triangle N.C.
Project Enlightenment Foundation
Woods Charter School

Community Improvement

Community and Senior Services
of Johnston County
Neighbor 2 Neighbor
Strowd Roses, Inc.

Health Care/Mental Health

AIDS Community Residence
Association, Inc.
American Cleft Palate-Craniofacial
Association
Caring House
Club Horizon
NC Association for Marriage
and Family Therapy
Piedmont Health SeniorCare
Piedmont Health Services, Inc.
The Arc of Durham County, Inc.
Wake Health Services
Women's Birth and Wellness Center

Social Services

A Ban Against Neglect
AventWest Community
Development Corporation
Caramore Community, Inc.
Community Home Trust
Compass Center for Women and Families
*(formerly The Women's Center and Family Violence
Prevention Center of Orange County)*

CORA Food Pantry
County of Durham
Dorcas Ministries - CCA, Inc.
Durham Center for Senior Life
EmPOWERment, Inc.
ESC Chicago
Exchange Clubs' Family Center
Family Support Network of Wake County
Hope for Haiti Foundation
Inter-Faith Council for Social Services, Inc.
Little Pink Houses of Hope
Meals on Wheels of Durham, Inc.
Meals on Wheels of Wake County
North Raleigh Ministries, Inc.
Open Table Ministry
South Orange Rescue Squad
Telamon Corporation
The Forest at Duke
Urban Ministries of Durham
Wake County Government

Other

Blacknall Memorial Presbyterian Church
Eyes Ears Nose and Paws
Neuse River Golden Retriever Rescue
Presbyterian Prison Ministry

Staff

Trudy Smith – Executive Director

Kate Mazza – Associate Director (Wake County)

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
Joe Glasson
Bonnie Gordon
Gracie Johnson-Lopez
Linda Luftig
Melissa Martin
Ed McCraw
Dave Pottenger
Josh Ravitch
Harold Sellars
Fred Stang
Judy Wilson-Kontny



Trudy Smith
Executive Director



Kate Mazza
Associate Director
(Wake County)



TERRI BUCHANAN
Administrative Professional

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.

ESC

Executive Service Corps *of The Triangle*

PROFESSIONAL
AFFORDABLE
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NONPROFITS

For a no-cost, in-person consultation, please contact Executive Director, Trudy Smith or Associate Director (Wake County), Kate Mazza.

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