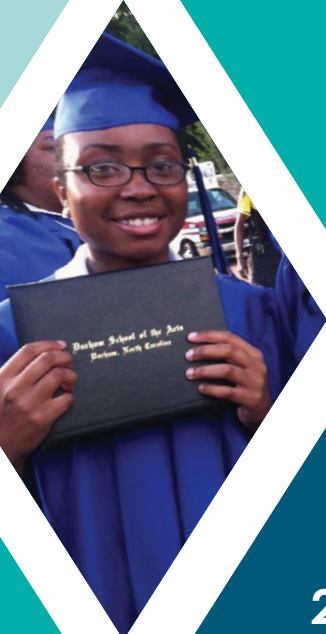


NIMBLE.  
RESPONSIVE.  
IMPACTFUL.

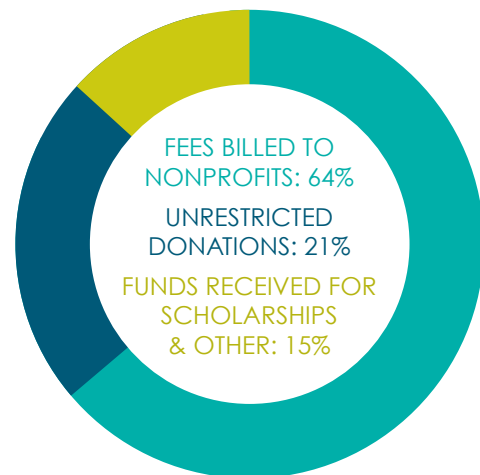
**2014**  
Report to the  
Community



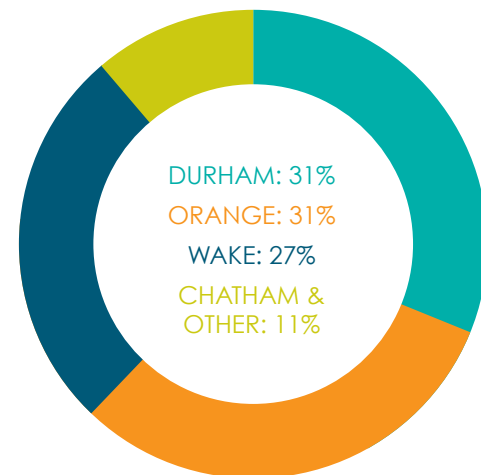
Executive Service Corps  
of The Triangle

*Professional, Affordable Consulting for Nonprofits*

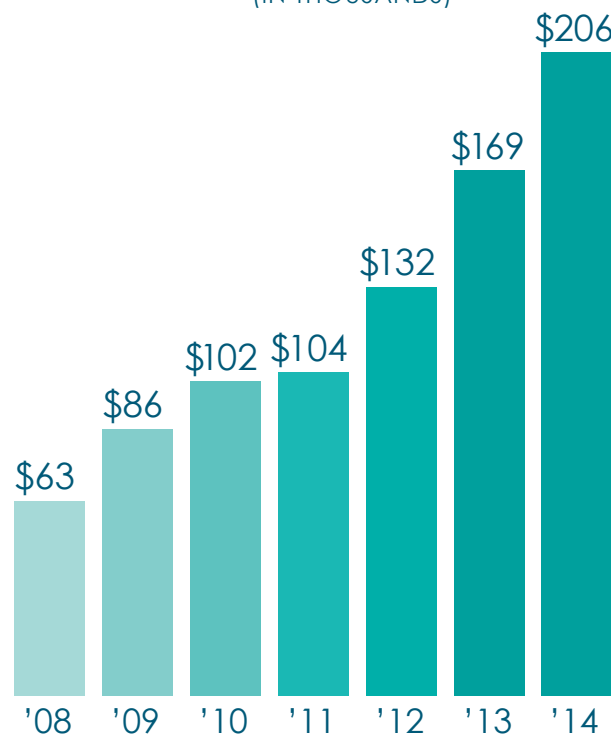
REVENUE BY SOURCE



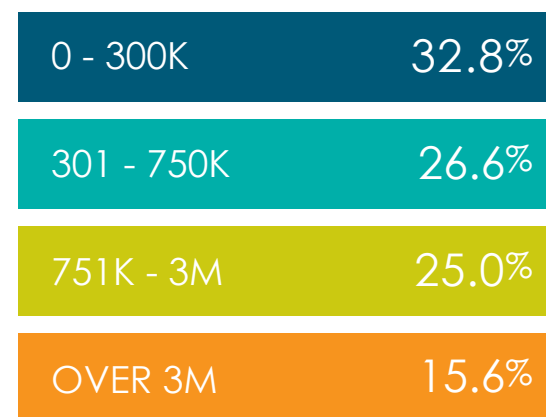
ENGAGEMENTS BY COUNTY



TOTAL ESC INCOME  
(IN THOUSANDS)



CLIENT SIZE



2014 was a year of significant progress for our organization.

We were nimble. We are proud of the partnerships and collaborations we developed that allowed us to try new things.

At the same time, we were responsive to our clients and our donors and had a remarkable year of growth with the services we provided.

And we were impactful. We were careful to measure the quality of our work, and we helped organizations better measure outcomes.

Let me outline just a few of our many achievements.

In partnership with Blue Cross and Blue Shield of North Carolina Foundation, we developed a Board Leadership Basics Program that brought together nonprofit leaders from 11 Triangle nonprofits to learn and share in six sessions on management and leadership skills. Session materials were shared through a private Dropbox, and all participants were encouraged to spread their takeaways with other board and staff.

Realizing that “speed-dating” has an application for nonprofits, we brought together a number of agencies looking for new board members or board committee members with talented Blue Cross and Blue Shield of North Carolina management employees as a pilot program. This unique event was highly successful and could serve as a model for other companies in the future.

We also had a strong year in providing consulting services, with a 9 percent increase from last year in client engagements.

Our most popular service continued to be executive coaching, a one-on-one, confidential coaching program we offer to nonprofit leaders. We completed 22 executive coaching engagements in 2014, and we have over 20 additional leaders continuing coaching into 2015. Our second most popular service was board retreat facilitation, with 18 board retreats completed for our clients this year.

All of this was made possible by the generous gifts by individuals, foundations and corporations. These donations were used in part to provide partial scholarships to 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.

We are most proud of our pro bono consultants, who continue to amaze us with their professionalism and their willingness to serve. We also enhanced our quality controls to ensure that we are offering top-notch consulting services. Furthermore, we created a program to better measure outcomes, a key issue for many organizations and donors in the nonprofit community.

In this report, we have highlighted four of our client consulting engagements. We hope you will take a moment to read these stories and learn more about how we worked with these excellent organizations.

We are pleased with our progress in 2014. By being nimble, responsive and impactful, we believe we are enhancing our service to the community.



**Trudy Smith**  
EXECUTIVE DIRECTOR

*Executive Director Trudy Smith has been with ESC for nine years—expanding the number of clients served, the number of services offered and the number of pro bono consultants. Trudy’s goals are to broaden ESC’s reach to all Triangle nonprofits and to further strengthen ESC as a critical resource for the nonprofit community. She is also committed to quality, innovation and measuring outcomes to ensure maximum effectiveness.*

**Trudy Smith**  
EXECUTIVE DIRECTOR, ESC OF THE TRIANGLE



MARKETING/  
COMMUNICATIONS PLAN

## Carolina Tiger Rescue

More than 14,000 people visit Carolina Tiger Rescue in Pittsboro each year to tour the sanctuary of tigers, lions, leopards and other animals living in large natural habitat enclosures on a 55-acre site.

During 2014, Carolina Tiger Rescue worked with ESC to enhance its marketing and communications, stressing its role as a sanctuary and its dedication to education and advocacy for the care and preservation of animals like those it houses.

"The consultants were wonderful to work with," said Pam Fulk, executive director of Carolina Tiger Rescue, when discussing the ESC consultants on her project. "We had a very good experience."

As a result, she said Carolina Tiger Rescue is taking a more proactive approach to marketing, with special emphasis on training its tour guides to explain its mission to visitors and to seek to broaden support of the organization.

### PROVIDING A SANCTUARY

The central mission is to serve as a sanctuary, which is not only a generic term but a legal one under a federal law that recognizes Carolina Tiger Rescue as the only wild cat sanctuary in North Carolina. Sanctuaries do not breed, buy or sell the wild cats in their custody. "We provide them a home for life," Fulk said.

Their animals are rescued from unfit situations or are donated by people or organizations that cannot care for them. For example,

one cat, a serval, was taken by animal control officers from a small filthy cage in a Hendersonville backyard and now lives at Carolina Tiger Rescue. Four tigers came from a small family zoo in Alabama.

Many of the animals, according to Fulk, are purchased as pets when they are small but then outgrow the capabilities of the owner. It is legal in North Carolina to own wild cats as pets, with no restrictions. Hence the need Carolina Tiger Rescue works to fill, with a staff of 14 full-time and two part-time employees and more than 170 volunteers.

### AN AGGRESSIVE PLAN

Increased fundraising is part of the three-year plan developed with ESC consultants to help the organization gain members, donors and business supporters.

Carolina Tiger Rescue is on its way to building six new big cat habitats, which is financed through an \$84,000 fundraising campaign. The new facilities would house up to 12 more tigers or lions.

"We need to prepare as fast as we can for new rescues," Fulk said. "Most of our requests are to rescue tigers and other big cats. We want to be able to say 'yes' to the next requests, and ESC's guidance will help make that possible."

## Partners for Youth Opportunity

With increased demands for their services and declining resources and financial pressures, nonprofits often find collaboration is one way to address these enormous challenges. However, sometimes a merger provides even greater value.

In 2014, ESC assisted Partners for Youth and YO:Durham, two Durham organizations, with their desire to explore the feasibility of merger. Both organizations were originally created to address the growing "opportunity gap" resulting from the chronic disconnection of Durham youth from economic and educational opportunities.

The resulting merger between Partners for Youth and YO:Durham created the new organization: Partners for Youth Opportunity.

The merger has enabled the organization to more effectively reach Durham youth, develop partnerships with businesses, schools and other community stakeholders and recruit volunteers. The organization works directly with Durham's at-risk youth to provide mentoring, employment and internships and educational support.

As Executive Director Julie Wells explained, "Both of our organizations were struggling with long-term financial stability and with the desire to serve more students than we had capacity. We recognized that we served similar groups of youth and shared the same values. If we could combine, we would have the resources to better carry out our mission."

COLLABORATION SERVICES/  
MERGER PLANNING

### THE MERGER ASSESSMENT AND PLANNING PROCESS

The two organizations contracted with ESC to help assess the opportunity and guide the groups through the merger planning process.

"We recognized that we needed help," explained Wells. "We sent out a RFP to a number of groups but selected ESC because of its clear merger planning process, previous experience and affordability."

Both organizations appointed members of their board to a special task force to assess the situation and develop a merger plan. The process took about three months.

### THE CONSULTANTS WERE KEY

"We were really pleased with our consultants," Wells said. "They kept us on track, made sure everyone was included in the conversation and, most importantly, helped us think long term, not just short term. I highly recommend ESC to any organization thinking about a merger. There are so many challenges that you really need someone to help guide you through the process."

The experience was so positive that the organization contracted ESC for several additional projects! ESC conducted a board development project and developed a marketing/communications plan in 2014. In addition, ESC is providing executive coaching services to Wells that will continue into 2015. Wells was very enthusiastic about all of the consulting projects and said, "The ESC consultants have been amazing to work with. We are very grateful for their contributions."

"The consultants were wonderful to work with. We had a very good experience."

PAM FULK, EXECUTIVE DIRECTOR, CAROLINA TIGER RESCUE

"I highly recommend ESC to any organization thinking about a merger. There are so many challenges that you really need someone to help guide you through the process."

JULIE WELLS, EXECUTIVE DIRECTOR, PARTNERS FOR YOUTH OPPORTUNITY



## GUIDED ORGANIZATIONAL ASSESSMENT

## Stop Hunger Now

Stop Hunger Now is an international hunger relief organization that had a remarkable success story to tell before consulting ESC for an organizational checkup on its rapidly expanding operations.

“The guided organizational assessment provided a useful framework to assess what we need to address going forward,” said Rod Brooks, president and CEO of Stop Hunger Now. “I’m confident it will greatly enhance our effectiveness.”

A fascinating story, the organization was founded in Raleigh in 1998 and now has branches in 20 American cities and four foreign countries. Stop Hunger Now’s stated mission is to end hunger in our lifetime, and it concentrates on chronic malnutrition and disaster relief needs, partnering with a network of organizations that now reaches into 40 nations. Brooks said Stop Hunger Now has been growing at a rate of 57 percent a year over the past eight years, which has been “an incredible time for us.”

The Stop Hunger Now staff has grown from five people in 2006 to about 100 full-time and part-time staff now. Managing that magnitude of growth would be a major challenge for any organization.

### THE ASSESSMENT PROCESS

The Stop Hunger Now Board of Directors asked ESC for its advice, and a team of three consultants went to work early in 2014 to provide a guided organizational assessment. ESC uses a survey consisting of 131 questions as part of its assessment process.

Brooks said that the ESC consultants were knowledgeable, experienced and efficient.

“The effort was enhanced by the skills of the ESC consultants,” Brooks said. “I certainly would recommend ESC to other organizations.”

The ESC team made nine recommendations regarding auditing, management of local advisory boards, a three-year strategic plan and other fronts. “They helped us prioritize what we need to be doing to strengthen our organization,” Brooks said.

### HUNGER RELIEF WORK CONTINUING

A meal-packaging program created by Stop Hunger Now in 2005 is the central part of its hunger relief work now. The packages include rice, soy, dehydrated vegetables and flavoring in small packets. Each meal costs 29 cents and has a shelf life of two years.

“It is a direct, hands-on way to fight hunger,” Brooks said. “You do a lot more than write a check – although we hope for that, too, as people understand the sustainable development we are also doing.”

The Stop Hunger Now statistics on the meal program include that, worldwide, more than 500,000 volunteers have contributed to the packaging of nearly 172 million meals distributed in 65 nations.

“They helped us prioritize what we need to be doing to strengthen our organization.”

ROD BROOKS, PRESIDENT AND CEO, STOP HUNGER NOW

## El Futuro

El Futuro is a nonprofit organization that provides and advances bilingual and culturally informed behavioral health treatment for underserved Spanish-speaking individuals and families. The organization provides clinical services, training for professionals who work with this population and prevention, education and outreach in the community. It has received the state’s highest honor for nonprofits from the N.C. Center for Nonprofits – the Nonprofit Sector Stewardship Award.

Karla Siu has served for eight years as a therapist and for the past three years as clinical director of El Futuro. As clinical director, Siu turned to ESC’s executive coaching program to help her grow as a leader.

“I was raised in deferential cultures – where people have a high regard for authority and collective needs – so I needed to find my own leadership and management style,” says Siu, who grew up in Honduras, Tokyo and Virginia. Her previous experience included work in welfare reform, community mental health and social work research.

With the help of her ESC executive coach, Siu learned how to cast vision and execute leadership. “The questions from my coach led to my growth in many areas, particularly in the area of encouraging others to participate in the vision,” she said.

“My coach and I worked well together. She offered perspectives I had not considered and provided a different way to think about challenges.”

KARLA SIU, THERAPIST AND CLINICAL DIRECTOR, EL FUTURO

## EXECUTIVE COACHING

### BENEFITS OF EXECUTIVE COACHING

Many leaders and managers in the nonprofit sector are increasingly turning to coaches for support. This support can take the form of a coach providing in areas like making decisions, focusing on interpersonal skills and building productive relationships. In addition, a good coach can provide unfiltered feedback, which is often hard to get at the highest levels of an organization.

A good coach can do these things and isn’t afraid to push their clients beyond what they previously thought was possible.

“My coach and I worked well together,” Siu said. “She offered perspectives I had not considered and provided a different way to think about challenges. Her calm and confident disposition helped me get through one of the toughest years.”

Pleased with her experience, Siu recommends ESC coaching to other nonprofit leaders. “They would receive the necessary guidance, support and insights to accomplish their organizational goals,” she said.



Karla Siu  
CLINICAL DIRECTOR



PROFILE OF A  
CORPORATE DONOR

## Blue Cross and Blue Shield of North Carolina

Blue Cross and Blue Shield of North Carolina (BCBSNC) has provided high quality, affordable health insurance for our state since 1933. The North Carolina-based company employs more than 4,500 North Carolinians and serves more than 3.8 million customers. Working to improve the health and well-being of members and communities across the state, BCBSNC leverages employee volunteer efforts, provides financial support and builds community-focused partnerships.

Employees of BCBSNC have logged over 377,000 volunteer hours since 1997. Company leaders are also actively engaged in the community, and more than 80 percent volunteer in support of local nonprofits. The BCBSNC Foundation, an independent charitable affiliate, has awarded more than 680 grants in support of North Carolina communities since 2000.

Vice President of BCBSNC Corporate Affairs and President of the BCBSNC Foundation Kathy Higgins noted BCBSNC's service to the state for more than 80 years. That type of embedded connection to North Carolinians and their communities is central to the company's mission.

"Nonprofit organizations are deeply connected with North Carolina, with missions focused on improving our communities. This common goal is why our partnerships with local nonprofits are a natural fit," she said.

"One of the best ways to strengthen communities in North Carolina is to invest in nonprofit capacity-building efforts. ESC is a group of seasoned, caring professionals who know about nonprofit leadership and care about their communities," Higgins added.

BCBSNC has provided financial support to ESC since 2006. Some of this support is through giving annual grants to maintain and promote Triangle BoardConnect, ESC's no-cost board matching program, and some is through funding new programs like Board Leadership Basics and other events to develop the capacity of nonprofits in the local community.

"Services provided by ESC help develop nonprofit leaders so they can address the challenges facing their constituents from a more strategic perspective. The impact of their expertise is exponential," she said.

### 2014 FOUNDATION & CORPORATE DONORS

BIN Charitable Foundation, Inc.	Maxwell, Freeman & Bowman, P.A.
Blue Cross and Blue Shield of North Carolina	Morgan Stanley
Duke Energy Foundation	Town of Chapel Hill
Fox Family Foundation, Inc.	Triangle Community Foundation
	Vaguely Reminiscent



## Pat Nathan

While working as a corporate executive for Dell in London, England, Pat Nathan founded a chapter of Women in Technology International. The chapter held a suit drive for Dress for Success of London, and the advertising visual of a woman in a suit jacket captioned "to some women, this is a lifejacket" stuck with Nathan long after the event.

In 2007, after retiring from Dell two years earlier, Nathan remembered that visual and looked to become involved with a local Dress for Success chapter, but none existed. She founded Triangle Dress for Success in 2008 and, over the past seven years, has helped women enter the workforce by providing professional clothing and career development services. It was during the process of preparing a detailed business plan for submission to Dress for Success Worldwide that Nathan learned about ESC.

"When it came to the fundraising section, I was stumped," Nathan said. An ESC consultant helped Nathan develop this section of the plan. Over the next six years, whenever Triangle Dress for Success

lacked a required skill set, Nathan leveraged the expertise of ESC consultants to build the organization's capacity. "ESC is a team of compassionate professionals who have a good knowledge of nonprofit business and what leadership skills it takes to manage and govern successful organizations."

Nathan believes that investing in similar capacity-building efforts is the most impactful way of helping nonprofit organizations achieve their missions. This is why she chose to give to the Perry Colwell Fund, which was established by ESC in 2014 to support leadership development in the Triangle.

"ESC is very well managed, and the executive director has been recognized for her involvement with ESC at the national level," Nathan added. "I am confident that ESC will maximize the impact of my gift."



Pat Nathan

### 2014 INDIVIDUAL DONORS

Mary Alexion	Becky Carver	Susan Kaplan	Peter and Prue Meehan	Julie Rigby
Heather Lynn Bailiff	Tom Cogswell	Judy Kelly	Verona Middleton-Jeter	Sandra Rodriguez
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**YOUTH & EDUCATION**

Augustine Literacy Project  
 Book Harvest  
 Central Park School for Children  
 Chapel Hill Day Care Center  
 Chatham County Literacy Council  
 Communities in Schools Chatham County  
 Crayons2Calculators  
 Durham Literacy Center  
 Durham's Partnership for Children  
 Garner PAAL  
 Girls on the Run of the Triangle  
 Haven House  
 Kidznotes  
 Learning Together, Inc.  
 Make-A-Wish Eastern North Carolina  
 Note in the Pocket  
 Partners for Youth Opportunity  
 SEEDS  
 Sister Communities of San Ramón, Nicaragua  
 Student U  
 The Walking Classroom

**HEALTH CARE,  
 MENTAL HEALTH  
 & WELLNESS**

Arc of the Triangle, Inc.  
 Art Therapy Institute  
 Blue Cross and Blue Shield  
 of North Carolina  
 Blue Cross and Blue Shield  
 of North Carolina Foundation  
 Community Nutrition Partnership  
 El Futuro  
 Hemophilia of North Carolina  
 HD Reach  
 Lucy Daniels Center  
 Piedmont Health Services, Inc.  
 Project Access of Durham County  
 YMCA of the Triangle

**HUNGER & HOMELESSNESS**

Community Empowerment Fund  
 Farmer Foodshare  
 PLM Families Together  
 Stop Hunger Now  
 Urban Ministries of Durham  
 Women's Center of Wake County

**PUBLIC & SOCIETAL BENEFIT**

Chapel Hill-Carrboro Youth Forward  
 Mt. Level Community Haven  
 North Carolina Center for Voter Education  
 North Carolina Veterans Business Association  
 Siler City Development Organization!

**ARTS, CULTURE & HUMANITIES**

CAM Raleigh  
 Durham Art Guild  
 NC Theatre  
 Raleigh Boychoir  
 Southern Documentary Fund

**FAITH-BASED**

Buddhist Families of Durham  
 North Carolina Hillel  
 Westminster Presbyterian Church

**ENVIRONMENT & ANIMALS**

Alliance for Saving Threatened Forests  
 Carolina Tiger Rescue  
 Rural Advancement Foundation International-USA

**OTHER HUMAN SERVICES**

Caring House  
 Durham Economic Resource Center  
 Executive Service Corps of Chicago  
 Hispanic Liaison of Chatham County  
 InterAct  
 Little Pink Houses of Hope  
 Orange County Disability Awareness Council  
 United Way of Chatham County

**2014 ESC BOARD OF DIRECTORS**

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Steve Berg	Fred Stang

**ESC STAFF**



**Trudy Smith**  
 EXECUTIVE DIRECTOR



**Kate Mazza**  
 ASSOCIATE DIRECTOR  
 (WAKE COUNTY)



**Kate Parker**  
 DIRECTOR OF INTERNAL  
 OPERATIONS

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Brian Breneman	Ed McCraw
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George Cahill	Tom Medlin
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## 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.

## 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.

## 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

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.

## ADDITIONAL SERVICES

We can help with human resources issues, organizational assessments and crisis management.

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

**Executive Director Trudy Smith:** [trudy@esctriangle.org](mailto:trudy@esctriangle.org)

**Associate Director (Wake County) Kate Mazza:** [kate@esctriangle.org](mailto:kate@esctriangle.org)



Executive Service Corps  
of The Triangle