2015 RESULTS

REVENUE BY SOURCE
- Fees billed to nonprofits: 67%
- Unrestricted donations: 23%
- Funds received for sponsorships & other: 10%

ENGAGEMENTS BY COUNTY
- Orange: 36%
- Wake: 36%
- Durham: 25%
- Chatham & other: 3%

TOTAL ESC INCOME (IN THOUSANDS)
- '08: $63
- '09: $86
- '10: $102
- '11: $104
- '12: $132
- '13: $169
- '14: $206
- '15: $225

CLIENT SIZE
- 0 - 300K: 42%
- 301 - 750K: 22%
- 751K - 3M: 25%
- Over 3M: 11%
2015 was a year of transformational change for both our organization and a number of our clients.

Within ESC, we continued to strengthen our organization, including enhancing our consultant training and recruitment programs and developing a process to better measure outcomes for our clients and track our success. At the same time, we developed a new strategic plan that will help us improve our overall quality across all functions. We are proud to have utilized our own ESC consultants to guide us in this process.

I am proud of a number of our key achievements this past year.

In partnership with Blue Cross and Blue Shield of North Carolina Foundation, we offered two board leadership programs, one in the spring and another in the fall. Through these programs, we offered sessions on nonprofit best practices and leadership skills to 46 individuals from 23 agencies.

In late 2015, we partnered with RTP Foundation to hold two more “speed-dating” events following our success in piloting the program in 2014. In total, we brought together 20 agencies looking for new board members with 40 individuals seeking leadership opportunities. These unique events have been very successful in matching highly qualified individual leaders with organizations needing expertise, and we hope to do more of these events in the future.

We also had a strong year in providing our more traditional consulting services for nonprofits. Our roster of 65 pro bono consultants conducted 83 individual engagements for our clients in 2015.

We continue to be amazed at the extraordinary work and dedication of our volunteer consultants. We are looking at new methods of recruiting even more consultants to meet the growing needs of the Triangle nonprofit community.

Our success was made possible by the generous gifts by individuals, foundations and corporations. These donations were used in part to provide partial sponsorships 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.

In this report, we feature success stories from a few of our clients. We hope you will take a moment to learn more about how we work with these excellent organizations.

We are pleased with our progress in 2015. We are also looking forward to continued transformational change in partnership with the nonprofit community in the future.
WHEN TWO ORGANIZATIONS dedicated to addressing family homelessness in Durham decided to merge, it was a perfect match – their missions and goals were shared, although their paths to those aims had been different. Even so, the merger of Genesis Home and Durham Interfaith Hospitality Network (DIHN) was not without challenges.

Indeed, at one point their discussions stalled as they tried to work beyond their differing organizational cultures. That is when they turned to Executive Service Corps of the Triangle (ESC) late in 2014. “We really needed a facilitator,” said Ryan Fehrman, executive director of Genesis Home. They got that and more – a team of three volunteer consultants who are experts in mergers, in corporate, and more importantly, nonprofit cultures and in the organization and missions of boards of directors.

The result: their merger into Families Moving Forward.

“I don’t know that we would be merging now without ESC,” Fehrman said. Catherine Pleil, executive director of DIHN, agreed. “It couldn’t be happening without them,” she said.

Genesis Home, founded in 1989, has a staff of 12 and operates its own three-story building in Durham, providing apartments for the homeless. Over the years, it has offered transitional housing, in which families could live in its building for up to two years. DIHN, which began in 1994, provided emergency housing that rotated among its congregations, with services provided through 800+ volunteers in over 30 congregations. In its system, homeless families stayed in facilities provided by one church for a week and then moved to another. It has a paid staff of three.

Both were evolving, in line with government and private experts on homelessness, to concentrate on more rapid re-housing. That involves helping homeless families move from shelters into permanent homes of their own as quickly as possible, with aftercare services to help them move beyond homelessness to stability.

Because of their shared goals, merging made sense. But that didn’t make it easy. DIHN’s leadership was concerned about how their congregational volunteers, the heart of their organization, would respond to merging with an organization with a more secular orientation. Genesis Home gets about one-third of its financing from government agencies and the rest from grants and contributions. “DIHN has a very strong and active volunteer base, which we want and need to keep,” Fehrman said.

That will be Pleil’s specialty in the new organization, as director of partnerships and programs. Fehrman will be executive director. The two boards of directors are merging into an expanded board for Families Moving Forward. There, too, ESC’s consultants provided guidance.

“They were very flexible and understanding in helping us break through barriers,” Pleil said.

For ESC, it was a major project, involving interviews and surveys in both organizations, 10 workshops and a communications plan for Families Moving Forward. The ESC fee was a fraction of what private consultants would have charged. “We’ve had a great experience at a very reasonable cost,” Fehrman said.

In the future, the Genesis Home building will be remodeled to provide interim housing for 21 homeless families. The new organization will provide temporary emergency shelter for 80-100 families a year, while helping them find employment and income that will enable them to move quickly into permanent housing. During their stay and for the following year, volunteers will help them develop skills for independent living in employment, financial literacy, healthy living and family relationships.

Leaders of the merging organizations agree that ESC was crucial in making it all work. “One of our best decisions was to involve ESC,” said Cindy Streett, board president of Genesis Home. “I honestly do not think we would have accomplished this without ESC.”

“They service has been excellent,” said Jim Hewitt, board president of DIHN. “We’ve had a great experience.”
HD REACH, an organization devoted to the care and support of North Carolinians suffering from Huntington’s disease, was at a pivotal point in its relatively brief history. After six years, its leaders wanted to expand and reorganize to help more patients across the state.

They needed more talent, better finances and a stronger governing structure. That meant an overhaul of their board, fundraising, financial management and database of clients and care providers.

For advice and counsel in those areas and more, HD Reach turned to Executive Service Corps of the Triangle (ESC). “They delivered high-quality consultants and people with executive experience that we could not have afforded any other way,” said Dr. Mary C. Edmondson, co-founder and president of HD Reach.

Dr. Edmondson had helped create HD Reach in 2009, stirred in part by her father’s death from Huntington’s disease, a genetic disorder that affects nerve cells in the brain. It is a degenerative disease, and, although there is presently no cure, symptomatic treatment improves quality of life and the ability to function. HD Reach provides the support and access to specialized care that patients and their families need to live well with Huntington’s disease.

After six years, she felt it was time for her to step aside for new leadership, although she remains committed to the organization and the cause. But, first, she helped lead the top-to-bottom overhaul of HD Reach, accomplished in 2015 with ESC’s volunteer consultants helping to guide the reorganization.

“ESC has been a huge part of our success and our growth,” she said.

There are about 1,000 Huntington’s disease patients in North Carolina, and, for each, five other people in the same family are at risk of having inherited the genetic flaw that causes it. To assist them, HD Reach works with about 310 care providers serving 722 patients. It has support centers in the Triangle, the Triad and Charlotte, with a new one to open in eastern North Carolina in 2016 and a fifth to open later in the west.

The geographic reach is important to patients because travel becomes increasingly difficult as the disease progresses. The goal is for each patient to have access to care no more than an hour from home, Dr. Edmondson said.

Reorganized, HD Reach will be led by an elected board chair. What had been an operating board will be a governing board dedicated to advocacy and fundraising instead of overseeing operations. That work is now done by a new executive director, Ann Lassiter, who was on the board for two years before moving to her new role.

All this comes at a time of planned expansion in the budget and reach of the organization. Over the past two years, the budget has been tripled. The funds are raised through foundation grants, corporate contributions and individual donations.

Lassiter recounted that the organization knew what it wanted to accomplish before the overhaul, but “we kept spinning our wheels.”

“ESC helped to spur us on. They’ve given us forward momentum,” she said. “I am in awe of the background and knowledge of their consultants.”

One major advance, Dr. Edmondson said, is in the overhauled database created with ESC consultant help.

“Now, for the first time, we have data that we can analyze – information on patients, their needs and their care,” she said. “With that, we can break down barriers, and average people can get the help they need.”

“ESC really helped us to become more efficient,” Lassiter said. “It’s been a very good experience.”
ORANGE COUNTY DISABILITY AWARENESS COUNCIL (OCDAC) is a small nonprofit with the big job described in its name – alerting governments, businesses and individuals to their responsibilities toward citizens who are disabled.

The organization was founded in 1977 in Orange County to educate, provide opportunities and ensure access – eliminating physical barriers – for the disabled. Dr. Timothy Miles, the long-time executive director, wanted to expand the council’s reach, visibility and effectiveness, and he turned to Executive Service Corps of the Triangle (ESC) for help.

He got it. A board retreat held in the fall of 2015 is leading to the reorganizing and broadening of the council’s efforts. Dr. Miles had been functioning effectively as both executive director and board chairman, a combination that often led him to do things personally, instead of discussing and delegating responsibilities.

ESC’s consultants recommended that a board chair be elected, that board communication be emphasized and that a more intensive recruitment process be created to develop a pipeline of future board and committee members.

That work is still in progress with ESC’s help.

By Dr. Miles’ account, it is going successfully. “Our communications are better,” he said. “We are in touch with more funding sources. We know better how to write and follow up on grant applications. I feel more confident because of ESC’s expertise and style. We all do.”

OCDAC conducts educational workshops and classes on providing opportunities for the disabled, concentrating on transportation, access in housing and public buildings and action to make technology accessible. The organization gets its message out through individual contacts, social media, public service announcements on radio and television and a local cable TV program. They have had the assistance of county commissioners in the Triangle – especially in Orange County, which provides OCDAC with its office headquarters in Chapel Hill.

All of this is done with a limited budget of $15,000-$20,000 a year, raised from individuals, foundations and local government sources.

OCDAC has no paid staff, and there are three part-time volunteers who work there. Its membership is small – 25-30 volunteers, with a nine-member board of directors. Expanding that base was one of the goals set at the ESC retreat.

“We’ve become more knowledgeable as a board and as an organization,” Dr. Miles said. “We’ve got a better package now. It has been empowering to us. I give ESC the thumbs up, three – four – five – make that 10 times.”

“I wouldn’t trade the ESC relationship for anything,” said Dr. Miles.
AS A GROWING AND THRIVING ORGANIZATION now in its fifth year, Book Harvest has counted on the advice of Executive Service Corps of the Triangle (ESC) from the start – and that has helped the organization succeed in its mission of putting books into the hands of low-income children in Durham and across the area.

In the latest chapter, Michele Lynn, board chair of Book Harvest, took part in an ESC program on board leadership basics, financed by Blue Cross and Blue Shield of North Carolina Foundation. The six seminars provided training on board operations, development and financing, roadmaps for the future, recruitment and other aspects of leadership in nonprofit organizations.

“These were really useful sessions,” Lynn said, for the information they provided and also for the interaction with the other nonprofits that took part. The participants shared ideas, discussed common problems and found the interaction a valuable part of the program.

The seminars continued a long relationship with ESC. “They’ve been our partner from the beginning in guiding our nonprofit,” she said. “We’ve always had this incredible resource in our corner.”

Book Harvest was founded in 2011 by Ginger Young, now executive director. It began in the garage and basement of her home, where the first crop of donated books for low-income children was stored for distribution through schools, community centers and social agencies. The initial meetings with ESC to plan a first board retreat and a financial assessment were held in Ginger’s kitchen.

Ginger’s vision was to provide low-income children with ready access to plenty of books. Initially, Book Harvest served as a community book bank of donated books, providing the books to partner organizations to share with the children and families they served. From that beginning, Book Harvest has diversified its program, placing 350,000 donated books in the hands and homes of local children to date.

Book Harvest’s programs include: Book Babies, which helps pre-school children build home libraries starting at birth; Books on Break, which equips children with 10 books every summer to combat summer learning loss; and the Community Book Bank, which provides books to low-income children in a variety of settings. Book Harvest works with more than 40 complementary organizations – schools, libraries, health clinics, social service agencies and community centers.

Since that basement beginning, Book Harvest has moved twice to accommodate its growth. Its current headquarters is on University Drive in Durham. It now has a staff of five. Its 2016 annual budget is $550,000, which includes funds raised from individual, foundation and corporate contributions. “We’ve had to change and grow and evolve,” Lynn said, and ESC’s consulting help has been an important part of that process.

The mission of books for children who need them is simple, and Lynn says that establishing a nonprofit to pursue this mission has been made simpler because of the support of ESC, an important ally in helping Book Harvest grow and thrive.

“We are deeply committed to ensuring that all our children have plenty of books during their first 10 years of life and, thus, a running start on academic and life success,” Lynn said. “When the income-based book gap is finally closed, our work will be done.”
ESC CORE VALUES

Volunteering – Our Passion is the Differentiator

WE VALUE:

KNOWING OUR CLIENTS
We listen and seek to understand each client’s unique needs, mission, vision, values and culture.

PROFESSIONALISM
We possess the required skills and knowledge to provide excellent service and demonstrable results.

BEING IMPACTFUL
We measurably improve our clients’ performance and, thereby, positively affect the communities they serve.

ACCOUNTABILITY
We feel a sense of shared ownership of our work with our clients for positive results.

RELIABILITY
We value dependability, diligent preparation and consistency of performance.

INTEGRITY
We hold ourselves to the highest ethical standards.

DIVERSITY
We seek to serve culturally diverse clients and to attract culturally diverse consultants and board members.

CONTINUOUS LEARNING
We pursue and promote continuous learning and growth for our clients and ourselves.

PERSPECTIVE
We hold ourselves to performance excellence and try to maintain perspective while doing it.

COMMUNICATION
We engage in a two-way process of reciprocal listening and information sharing.

RESPECT
We treat our clients and each other with the highest levels of respect and courtesy.
Fox Family Foundation supports ESC because they are a nonprofit capacity builder that assists with strategic planning, board development and financial diagnostic review, among other services. Through ESC’s work, they make nonprofits stronger in all the important work that they perform in our community. Several of our grantees have received guidance on a myriad of operational issues from ESC over the years, and all have reported that ESC made a difference in their respective organizations.”

– David Beischer
Executive Director, Fox Family Foundation

“When we relocated to the Triangle, we looked for a way to continue our involvement in supporting local nonprofits as we had done in our prior community. Soon after our arrival, we became aware of how ESC leverages local professionals’ time and talents to enable passionate nonprofit leadership to further develop their management skills, which leads to a sustainable change in the nonprofits’ impact on the community. Through our nonprofit work, we realize how important financial gifts are to ESC in achieving their mission of providing professional, affordable consulting services to Triangle nonprofits to help them achieve their missions. We may not all be able to share our time and talents, but, through ESC, we can share our financial treasures and leverage these gifts to maximize the community impact.”

– Charles and Renee Brown
ESC Consultant Family
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2015 ESC BOARD OF DIRECTORS

- Dave Pottenger, Chair
- Mary Alexion, Vice Chair
- Harold Sellars, Secretary
- Tom Cogswell, Treasurer
- Jean Adams
- Heather Bailiff
- Laura Benson
- Steve Berg
- Nick Bradfield
- Dave Gettles
- Bonnie Gordon
- Beth Maxwell
- Horace McCormick
- Ed McCraw
- Frankie Perry
- Elizabeth Pritchett
- George Williamson

2015 ESC CONSULTANTS

- Sue Adams
- Mary Alexion
- Linda Anderson
- Diana Bing
- Brian Breneman
- Charles Brown Jr.
- George Cahill
- Dick Cashwell
- Perry Colwell
- John Constance
- Sholeh Dadressan
- Paul D’Angelo
- Al Decker
- Kathy Doherty
- Gail Ferreira
- Lee Fogle
- Michael Friedman
- John Gabor
- Ed Gawf
- Dave Gettles
- Steve Hall
- Bobbi Hapgood
- Tom Hardy
- Ed Haugh Jr.
- Doug Hurley
- Paul Jacokes
- Marcia Jaquith
- Judy Kelly
- Jim Kinney
- Wendy Kuhn
- Nancy Laney
- Marilyn Longman
- Linda Luftig
- Mark Luftig
- Beth Maxwell
- Janet McCauslin
- Ed McCraw
- Marcy McKaig
- Tom Medlin
- Jenna Meints
- Verona Middleton-Jeter
- Rusty Myer
- Kenneth Pennington
- Godfrey Pinto
- Brenda Pomeroy
- Elizabeth Preddy
- Greg Roper
- Ed Rose
- Matt Runci
- Marty Saffer
- Ilona Sher
- Katherine Sliva
- Steve Smith
- Melissa Staples
- Jeff Swain
- Don Tiedeman
- George Tremmel
- Nic Versmissen
- Julian Wachs
- Bill Wallace
- Lee Watkins
- Michael Williams
- Stephan Wittkowsky
- Joel Zimmerman
- Arthur Zucker

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.

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.

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: Starting this summer, our web-based matching service will connect nonprofit boards with leaders wishing to serve on them.

ADDITIONAL SERVICES
We can help with human resources issues, fundraising planning, organizational assessments and crisis management.

For a no-cost, in-person consultation, please contact:
Executive Director Trudy Smith: trudy@esctriangle.org