



Executive Service Corps  
of The Triangle

Professional, Affordable Consulting for Nonprofits



**2017**  
Report to the  
Community

**Passionate** about  
**Nonprofit** Success





Executive Service Corps  
of The Triangle

TOTAL REVENUE:

**\$231K**

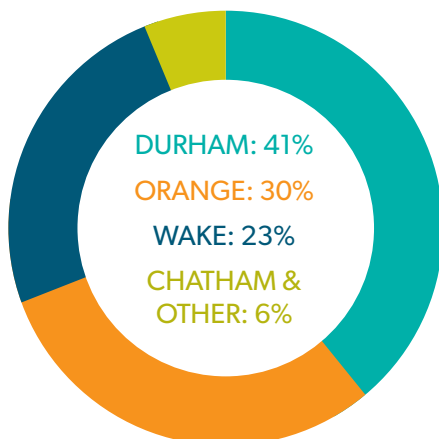
Revenue by Source



TOTAL ENGAGEMENTS:

**76**

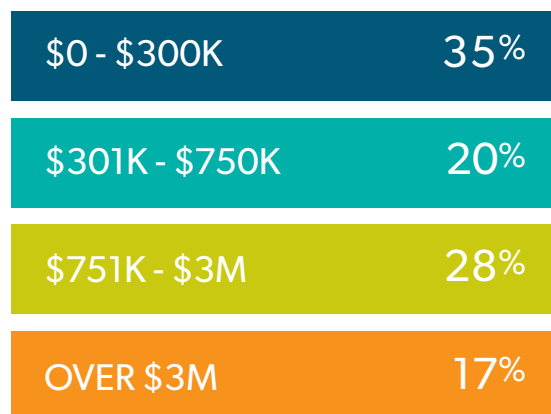
Engagements by County:



TOTAL CLIENTS SERVED:

**65**

Client Size:





## 2017 ESC BOARD OF DIRECTORS

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J.D. Brewer

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Deryle Gantt

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Kevin Jones

Kevin Kray Jr.

Sarah Thelen

Dear Friends,

While every community has its challenges, as ESC of the Triangle Board Chair, I know that our region is blessed with an abundance of strategic leadership talent and people of uncommon generosity.

In the past year, our pro bono consultants helped area nonprofits grow stronger in efforts to alleviate suffering and meet increasing demand for services and new economic realities. They helped build nonprofit leadership and solidified strategies that will have positive social impact for years to come.

And, thanks to donations from individuals, foundations, and corporations, ESC continued to deliver expert consulting and capacity-building services at nominal cost.

We've used our modest budget to strengthen delivery of services, offer two popular Board Leadership Boot Camps, and promote our Build a Better Board matching service, which connects nonprofit boards with people willing and qualified to serve.

I am especially proud of the excellent teamwork between our pro bono executive level consultants, our small but mighty staff, and our group of dedicated board members.

ESC commemorated its 30th year in 2017. Much thanks is due to former Executive Director Trudy Smith, who expertly led ESC through more than a decade of growth. Please join me in celebrating her work, particularly her ability to attract immeasurably talented and dedicated board members, staff, and consultants. We are passionate about continuing this tradition of service and excellence.

I'm excited to welcome our new Executive Director, Anne Saffer. Anne has been with ESC since 2015 as our Director of Consultant Development, and will now lead us into the future with the professionalism and passion for ESC that she has demonstrated these last three years.

It has been a pleasure and an honor to serve as the ESC Board Chair this past year, and a challenge to maintain the high level of dedication and expert leadership established by my predecessors. Together with our incoming Executive Director, current staff, consultants, and board members, we will take ESC of the Triangle to new heights!

Sincerely,

**George Williamson**  
*ESC of the Triangle Board Chair*





## **BETTER TOGETHER:** ESC of the Triangle partners help place two nonprofits on a single, more sustainable path

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*Two nonprofit organizations.*

*Two boards of directors.*

**One guiding star:**

*To improve the lives of individuals  
with oral cleft and craniofacial conditions.*

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The American Cleft Palate-Craniofacial Association (ACPA) and Cleft Palate Foundation (CPF) were two Triangle-based national organizations with a common mission and intersecting histories. The difference? ACPA was an association of health care professionals who treat patients with oral cleft and craniofacial conditions; CPF primarily provided patients and their families with information and educational resources, support, and connections to multidisciplinary care teams.

The question asked by then-ACPA Executive Director Wendy-Jo Toyama in 2015 was whether their independent and sometimes duplicative structures were muddying the message and limiting both groups' efforts to optimize outcomes and return on donors' investments.

After two years of in-depth analysis with each board, Toyama invited Executive Service Corps of the Triangle to facilitate an objective exploration of how to best serve their missions and, ultimately, patients and their families. ESC suggested a consultant with industrial-strength private sector merger know-how. Toyama said it would also be helpful to have an expert in nonprofit finances.

ESC tapped a former Kodak senior executive with organizational development experience, Charles Brown, and a finance and operations expert, Martin Saffer. The consultants interviewed several board members and then led the two boards through an examination of six possible configurations on a continuum — from remaining independent, to various forms of partnership, to merger. The boards shared a commitment to achieving the best outcome for children with craniofacial abnormalities, and helping families support their children through the medical complexities and social challenges they encounter. They agreed that a merger was the right course of action.

"ESC was thoughtful about matching consultants to the task, and Marty and Charlie brought no preconceived notions of the end result," Toyama said. "Board members themselves quickly homed in on the benefits of a merger to patients and families, and Charlie and Marty used that shared intention as a guiding star."

With the decision to merge behind them, the next phase of the ESC engagement was rapid cycle implementation. Toyama, ACPA President Robert Havlik, and CPF President Marilyn Cohen wanted to complete the legal and financial merger in time to begin operating as one at the start of the fiscal year, just six months away.

"ACPA and CPF had the advantage of having once been one organization, with a history of various levels of cooperation," Brown said. "The boards understood each other's history, values and operations. We brought the tools and timelines and watched the calendar, but it was Wendy's leadership that accelerated the work. She really embraced the role of supporting the board presidents."

According to Toyama, having the ESC consultants focus on the "nitty gritty technical aspects" of merging freed her to attend to interpersonal relations. "It felt like they were part of the team," Toyama recalled.

The decision was made to keep the American Cleft Palate-Craniofacial Association name. The Foundation continues as ACPA Family Services.

Today, six months in, Toyama is happily guiding her workforce in merging operations.

"Unifying operations is a lot more complex than it looks at the onset," she said with a chuckle.

Fortunately, the ACPA-CPF lodestar continues to burn brightly.



## ESC consultants build **TRUSTING RELATIONSHIPS** to assist nonprofits and their clients

*Streamlined operations at **InterAct** put clients on the path to recovery.*

*To escape yet another beating, a woman fled her house on a rainy night, barefoot and with only the clothes on her back. She ran, feet bloodied, for miles to a fire station, where firefighters called police, who took her to InterAct and safety. InterAct provided emergency shelter, food, clothing and comfort. More importantly, counselors helped the woman formulate a plan. A few weeks later, as she boarded a bus for a new state with a new identity, the woman told her support team, "This is the first time I have felt hope in 15 years."*

Recovery from domestic violence or sexual assault is a journey that typically begins on a winding path through hospitals, police stations, and courtrooms, not to mention counseling and support sites miles apart.

In 2009, InterAct of Wake County had a better idea: invite service delivery agencies and Raleigh law enforcement to share space at the InterAct Family Safety & Empowerment Center. There, under one roof, Triangle residents find the strength and support to put their lives back together with the help of professionals and volunteers who are experts in trauma and its aftermath.

The wrap-around approach raised the accessibility and visibility of InterAct services among victims and first-responders alike. By 2014, the organization's daily walk-in volume had tripled. InterAct executive director Leigh Duque saw that demand for crisis intervention had outrun resources. A creaky database, outdated technology, and legacy processes that sometimes overlapped each other were slowing the delivery of services and taking an emotional toll on the agency's passionate staff and volunteers. She needed help to address four interrelated challenges - staffing, technology, planning, and communication - so she reached out to ESC.

Enter first-time ESC consultants Rick Matson and Michael Frisch, with deep experience in strategic planning and operational effectiveness. Their goal was to provide capacity-building tools and techniques that would free InterAct line staff to care for clients.

After visiting with Duque and her leadership team, the consultants drew up an operations process map to guide more informed investments in time saving software applications and hardware.

"Rick and Mike took a deep dive into programs and services," Duque recalled. "They had complete access and followed clients through every service, even taking calls on the crisis line."

The insights were granular. For instance, "mapping made us ask ourselves

if we really needed two separate intake forms for our shelter program and walk-in services," Duque said. "Asking a client the same questions to complete two forms risked re-traumatizing the victim with each telling, and didn't add value."

Once key processes were streamlined, Frisch and Matson were able to guide the selection of replacement software and computing equipment for client tracking and reporting. To improve interdisciplinary communication, the consultants helped InterAct set up shared electronic files. Now, everyone can see in realtime how many residential shelter beds are available.

Each improvement has revealed potential service delivery and systems enhancements, and Matson and Frisch now are helping InterAct design and implement a methodology for continuously monitoring and refining operations.

"Michael and I made a difference from the beginning by asking, 'Before we add more staff to deal with tripling of the workload, are we doing things in the most efficient and effective way?'" Matson said. "Streamlining initial paperwork was good for clients as well as staff. Then came better tools. When you produce tangible results it makes you feel good."

InterAct also wants to break the cycle of violence. The ESC consultants, recognized for their strong collaboration and leadership skills, have been invited to participate as coaches for InterAct's strategic planning and goal setting.

"I can't imagine life without Rick and Mike, they are so much a part of the team," Duque said. "They've given me the room to focus on strategic and tactical planning, like ongoing programmatic, staff, and volunteer assessment and development."

"I walked by our training center recently, and it was overflowing with staff and volunteers attending a mental health training," Duque recalled. "It was so gratifying to see them increasing their knowledge and skills to benefit our clients. That's a much more motivating use of staff and volunteer time than wrestling with systems, and it's going to help us put more resources into violence prevention."

According to InterAct Board of Directors Chair Chris Evans, the ESC engagement has strengthened the nonprofit's ability to achieve its mission. "Thanks to the infusion of ESC consultant talent, InterAct is furthering its ability to save lives, rebuild lives, and secure safer futures for our entire community," Evans said.





## HEALTH CARE, MENTAL HEALTH & WELLNESS

A Helping Hand  
American Cleft Palate-Craniofacial Association  
Blue Cross and Blue Shield of North Carolina Foundation  
Community Health Coalition, Inc.  
El Futuro  
Foundation for Health Leadership & Innovation  
Freedom House Recovery Center  
Friends of Club Horizon  
Friends of L'Arche North Carolina  
Hilltop Home  
Josh's Hope Foundation Inc.  
**JUST TRYAN IT**  
Orange County Health Department  
Piedmont Health Services, Inc.  
Playworks North Carolina  
Ronald McDonald House of Chapel Hill, Inc.  
UNC-Chapel Hill School of Social Work  
West End Community Foundation

## YOUTH & EDUCATION

Achievement Academy of Durham  
Book Harvest  
Chatham County Literacy Council  
Crayons2Calculators  
Ivy Community Center  
Learning Outside Inc.  
Raleigh Boychoir  
Rebound  
SKJAJA Fund  
Swingpals Inc.  
Wake County SmartStart  
The Walking Classroom

## ARTS, CULTURE & HUMANITIES

The ArtsCenter  
Cary Playwrights' Forum  
Durham Art Guild  
North Carolina Symphony  
The Vivaldi Project

## HUNGER & HOMELESSNESS

CORA Food Pantry  
Families Moving Forward  
Habitat for Humanity of North Carolina  
Meals on Wheels of Durham, Inc.  
Nourish International  
TABLE, Inc.  
Western Wake Crisis Ministry  
Women's Center of Wake County

## PUBLIC & SOCIETAL BENEFIT

Chapel Hill-Carrboro Chamber of Commerce  
The Daily Tar Heel  
Dress for Success Triangle NC  
El Centro Hispano  
The Hub Farm  
NCSU Institute for Nonprofits  
Noise Free America  
Raleigh City Farm  
South Eastern Efforts Developing Sustainable Spaces, Inc.  
StepUp Durham  
Triangle Community Foundation

## SENIOR LIVING

Durham Center for Senior Life  
Wake County Senior Games

## ENVIRONMENT & ANIMALS

Animal Protection Society of Durham  
Eno River Association  
New Hope Audubon Society

## FAITH-BASED

Beth El Synagogue

## OTHER HUMAN SERVICES

The Family Violence Prevention Center, Inc., DBA InterAct  
North Carolina Coalition Against Domestic Violence Inc.  
White Oak Foundation, Inc.



## INDIVIDUAL DONORS

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## FOUNDATION & CORPORATE DONORS

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 Triangle Community Foundation



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# ESC SERVICES

## Board Development

Increase your board effectiveness in such areas as roles and responsibilities, membership, organization, and operations.

## Retreat Facilitation

Let us help you lead your board or staff through a one-day retreat that helps everyone understand their roles, plan for the future, and/or address specific issues.

## Guided Organizational Assessment

Identify your organization's strengths and challenges in serving your mission or adopting nonprofit best practices. Develop a plan to improve.

## Strategic Planning

Develop specific plans to meet your organization's mid- and long-term goals, using a tailored process.

## Executive Coaching

An experienced coach will develop a one-on-one, confidential relationship with your executive designed to help your organization achieve its goals.

## Communications/Marketing

Improve your visibility and impact with key audiences and constituencies.

## Financial Assessment

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

## Mergers

ESC experts can help you with merger explorations and integration plans.

## Board Matching

### **Nonprofit Speed-Dating:**

In-person matching events connect nonprofit boards with prospective board members.

### **Build a Better Board:**

Use our web-based matching service to connect nonprofit boards with leaders wishing to serve on them.

[www.buildabetterboard.com](http://www.buildabetterboard.com)

## Additional Services

Hire ESC to assist with human resources issues, fundraising planning, process mapping, and crisis management.

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

**Executive Director Anne Saffer:** [anne@esctriangle.org](mailto:anne@esctriangle.org)



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