

RETIREMENT



Trudy Smith (center), executive director of Executive Service Corps of the Triangle, works with volunteer consultants like Beth Maxwell and Ed McCraw to assist local nonprofits.

GIVING BACK ONE MORE TIME

RETIRED EXECs FIND WAYS TO HELP – THIS TIME AS VOLUNTEERS

BY WALTER MEARS PHOTO BY BRIANA BROUGH

ATIGER SANCTUARY. A SYMPHONY ORCHESTRA. Public libraries. Charter schools. A town in Nicaragua. A Durham-based foundation that helps support more than 800 charitable trusts. That's a small sampling of the Durham and Triangle-area nonprofit groups that have turned to the **Executive Service Corps (ESC) of the Triangle** to enhance their operations with help from its volunteer consultants. ESC of the Triangle has a roster of nearly 60 retired or semi-retired professionals who serve as consultants. They earned leadership roles in business, government and education before retiring in Durham, Chapel Hill and other Triangle communities. For people who have reached top positions in their fields, it isn't always easy to wind down into retirement. So they

seek new challenges, and many find them in their ESC work. Many would command high hourly fees as private consultants working on management, strategic planning, communications, marketing and other specialties. ESC consultants offer their services to a range of nonprofits as unpaid volunteers.

"It's giving back to the community, working with other smart, creative people, and gaining both satisfaction and intellectual stimulation," says **Trudy Smith**, executive director.

A nonprofit organization is no less a business undertaking than a corporation, and it can be even more complicated to run. It must define its mission, attract donors for support, and find and often train leaders to manage its affairs.

In that cause, ESC provides vital, low-cost consulting services on the issues that confront nonprofit organizations as they work on behalf of the community.

Paid professional consultants would be too costly for most of the organizations ESC helps. It charges fees based on the size and resources of the nonprofit involved, averaging \$35 to \$60 an hour with the total rate contracted in advance. With paid consultants, the fee would be at least \$150 to \$200 an hour.

Based in Durham, ESC is part of a network of 22 Executive Service Corps operations in the United States. It dates from 1987, a decade after David Rockefeller and Frank Pace Jr., a business executive and former Secretary of the Army, founded the ESC-US organization in New York City.

Trudy has been with ESC of the Triangle for nine years. A 1982 graduate of Duke, she lived in Atlanta and abroad for 20 years, working in real estate, before returning to Durham. Volunteer work led her to the ESC job.

"It's still the lowest paying but the most rewarding job I've ever had," she says. She writes grant proposals, works at fundraising and lines up clients with consultants who meet their special needs. ESC does little advertising. Client referrals come largely from volunteer consultants, board members and other contacts from the Triangle's nonprofit world.

"It's mostly word of mouth," she adds. Last year, that led to 88 consulting contracts with an income of \$206,000 raised through client fees and donations from individuals, businesses and foundations. Trudy says each \$1,000 in the ESC budget leads to consulting services that would cost \$6,000 in the open market.

Recently, a group of ESC consultants created a sort of Internet dating service to match volunteers with organizations that need help in their specialties. In that program, professionals interested in serving on nonprofit boards post their skills and interests, and the nonprofits

MEET TWO ESC VOLUNTEERS

Ed McCraw

Ed retired at 58, and then he got busy. During his four years in Chapel Hill, he has been teaching, lecturing, serving on nonprofit boards, and volunteering his marketing and communications skills as a consultant with the ESC of the Triangle.

He says the ESC work is what got him going and connected. "I wanted to find a way to leverage my background and skills," Ed says. "I never would have been able to become a part of my community so fast on my own. ESC was a great way to meet and work with other professionals. I learn from my colleagues. If you want to make a difference, you are going to be able to do it faster through ESC."

Ed came to the area after retiring as vice president and senior business leader with MasterCard and Verizon in New York because he and his wife wanted to live in a college community. He does so actively, as an adjunct professor in the business school at UNC. He teaches a course in reputation management to MBA students, concentrating on crisis management and communications.

As an ESC consultant, he has worked with about a dozen nonprofit organizations, including the **North Carolina Symphony**, the **Town of Cary**, the **Durham County Literacy Center** and the **Chatham County Literacy Council**.

The time commitment varies – up to 10 hours a week when helping to develop a strategic plan for a nonprofit, fewer hours in fields like executive coaching. Rewarding hours, he says, because they keep him in contact with ESC consultants and clients in varying fields, delivering on his retirement plan to be engaged and contributing to the nonprofit community.

Mary Alexion

Mary is an expert at planning, by nature and by profession. Hence her retirement plan: volunteer her skills to be active, engaged and contributing to the community.

She worked for 35 years in information technology and data management, in corporations and as a consultant. She and her husband, **Andy Krumwiede**, decided that when it was time to retire, they would do so in the Chapel Hill area, after careers that took them from the northeast to Texas and back.

"I knew I wanted to stay active," she says. But she also knew it was time to retire from her work as a consultant, which kept her traveling as many as 48 weeks of the year.

"I looked for ways in which I could use the skills I developed in my career to help other people," Mary says. She began as a tutor for **Orange County Literacy**, and soon became a leader in that program and other nonprofit organizations. She helped reestablish the **Chatham County Literacy Council**. She is on the advisory council of the **Duke Institute for Lifetime Learning**.

She has been a volunteer consultant with ESC of the Triangle for six years and now serves as vice chair of its board of directors.

At ESC of the Triangle, she says, "What we all share is the feeling that we are helping and giving back. It's a place that makes you feel comfortable as a transition, giving you freedom to explore retirement while staying in touch with what you did. I'm a collector. I guess I collect challenges."

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post their profiles and board of director needs. "It has been most successful," says **Ed Rose**, one of the organizers.

The variety of organizations turning to ESC adds to the opportunity for consultants to gain rewarding experiences in fields that might seem unlikely.

For example, **Carolina Tiger Rescue** in Pittsboro, which draws more than 14,000 visitors a year to its sanctuary of tigers, lions, leopards and other exotic animals, needed help with marketing, training tour guides and explaining their mission. ESC consultants provided key support for their mission.

ESC provided executive coaching to the Durham nonprofit sponsoring a sister cities program with San Ramon, Nicaragua, which has improved schools and created libraries there.

When the North Carolina Symphony set about a new strategic planning program, ESC consultants helped design the blueprint that became the organization's guide. **Don Tiedman** of Chapel Hill, a 14-year veteran of ESC consulting and a longtime subscriber to the symphony, was delighted to join that project. "Needless to say, I learned a lot more from them about the workings of a large orchestra than they learned from me," he recalls.

Later, he became a consultant for **Freedom House** in Chapel Hill, wound up joining its board of directors and eventually became president.

Stories like his are not uncommon. **Robert K. Otterbourg**, who has been a reporter, public relations adviser and freelance writer, signed on as an ESC consultant nearly 25 years ago. In his book *Retire and Thrive*, which tells stories of satisfying retirement lifestyles and has gone to four editions, he recalls his ESC projects – a state historical site, an AIDS facility and the **Durham Public Library** among them. He became a trustee of the library and then chairman of its board. He is now fully retired and lives in Durham.

The **Triangle Community Foundation** turned to ESC consultants for strategic planning help. The Durham foundation, with assets of more than \$160 million, helps manage nearly 800 charitable trusts set up by individuals, families and corporations. It also has become one of the major funders of ESC's work.

"We believe that ESC's sweet spot is helping small- to midsized nonprofits, although that process is valuable for larger, more complex organizations as well," says **Lori O'Keefe**, COO of the foundation. She added its grants to ESC are "some of our most successful." **CHM**

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