

**ESC-US Conference Notes**  
**Oklahoma City**  
**September 15-17, 2016**

ESC-US Board Chair Darlyne Koretos opened the conference with a **business update**. At a Board meeting held on September 15, the Board and Officer slates were approved. Serving will be Darlyne Koretos (Chair), David Factor (Vice-Chair), Michael Towers (Treasurer), Paul Moore (Secretary), Craig Kowalski, Trudy Smith and Jane Greenman.

**Discussion of conference attendance** included the balance between a “direct flight city” and hotel costs, level of local board commitment, local budget and time challenges, and the changing scene in face-to-face conferences. One suggestion was to schedule periodic conference calls and include local board chairs. Notes of the current calls should be copied to local board leaders. Others included creating a secure website that local boards could access, a repository of best practices, and perhaps including consultant representatives in preference to local board members, depending on local culture. The conversation had positive tones in terms of how to build the ESC community. Other ideas shared included:

- Claim our share of credit for successes of organizations we help
- Quantify and claim the downhill flow of the (# X) organizations we helped and the (# Y) people they helped
- Grow our storytelling talent
- Photos in grant proposals are magical; use a pro photographer to build a photo library
- Use foam boards with blowup photos and captions to frame storytelling
- Provide training at conferences for like groups – marketing, consultants, etc.
- Use our own consultants to look at ESC branding – compare to similar organizations
- Consultants should be expected to participate financially
- Do your strategic plan internally, using your own consultant
- Use the ESC-US Member Lounge

The results of the **ESC-US questionnaire** were presented over Skype by John Kriese. They will be posted on the website for review. Anyone with ideas they'd like to see addressed should send them to David Factor and he will accumulate them.

Oklahoma City University students, grad students, and faculty did a major study on nonprofit perceptions of ESCCO. The results are available from Paul Moore.

A current ESCCO client who happens to also be a local board member had a testimonial to the work his nonprofit is benefiting from.

A panel presentation by Dr. Bob Spinks, Susan Agel, and Paul Moore focused on “We’re doing so much good; why don’t we feel better?” It was a presentation of a difficult time that each had faced and what they learned from it. It included a testimonial to the value of coaching; Susan is a current ESCCO coach as well as the ED of a client.

Attendees were then challenged to **focus on things that are keeping them up at night**, and listen throughout the conference for ideas that will help them resolve those situations.

Trudy Smith presented on **Build a Better Board**, an online board matching program they have developed in the Triangle. They received a \$20,000 grant from BCBS to create it and it is now up and running. Among benefits are teaching the value of strategic thinking in seeking board members. They use it to help individuals understand how to be good board members and what

their duties would be. Companies are interested in using it with their employees, to increase employee engagement in the community. It is presently free to both individuals and nonprofits, but ESC of the Triangle is exploring ways to monetize the system. Several ESC-US members are interested in using this program and the program was built to scale nationally. Trudy said that should be possible in about a year. She asked to hear from people who would participate in calls with her people to develop the licensing. David will do some follow-up. There is potential for BCBS to fund this in other ESC markets.

David Factor spoke on **Consultant Vetting and Onboarding**. Their primary focus in our criteria for accepting applicants is assessing emotional intelligence and their interest in and ability to use coaching rather than directing/commanding as their primary approach to clients. They have a hard and fast process which, so far without exception, prospective consultants must go through – including informational workshop, written application and interview – before being accepted into orientation program. David shared a power point presentation which you can reference.

David Factor shared the **points of pride for ESCSC**. Their audit now includes the value of donated time from consultants' work on behalf of ESC, based on data submitted to ESC monthly via an automated service log system. They hold an annual Volunteer Recognition Luncheon as a way to show appreciation for consultants' service. Event includes awards honoring 1-3 consultants for exceptional service to clients and to ESC itself, and to recognize a client ED who is nominated by consultants, and is partly underwritten by sponsorships by local bank and CPA firms.

**Oklahoma History Center** Director Bob Blackburn shared an outstanding presentation on unique things in the formation of Oklahoma City. He closed with his thanks for the Center being an ESCCO client and benefiting greatly from projects from day one. Julie Crockford asked if she could receive a one-page case study of ESCCO's sustainability project with the History Center; she sees it as a great example of serving a hybrid 501/state organization.

The group put forth a number of ideas on **revenue generation**:

- Social enterprises like Trudy's Build a Better Board
- Fee for service
- Be a landlord if you have extra space
- Sell back office services
- Charge consultants for training
- Know cost of service delivery and set fees accordingly
- Use a sliding fee structure
- Don't quote the price too early in the process
- Conduct lead-generator breakfasts in different sectors
- ED roundtables – peer coaching/cohort – 9-10 sessions x 2 hours each
- Sponsorships
- Funders pay fees for clients they want helped
- Fundable blurbs (David)
- Workshop sponsorships by would-be vendors – software company, CPA firm etc.
- Brand your products
- Business solutions as a catchall
- Develop ESC-US-wide revenue sources
- Phone coaching – promote it everywhere - searchable data base
- National webinar – local brings talent, all join in
- Consult on risk management (high level, not safety version)

- Pool our info on who has what resources of top talent – content experts – among affiliates' consultants and staff
- \$5000 workshop/webinar paid by a grantor to be delivered to all their grantees
- Boston as a broker of pro bono legal

Craig Kowalski spoke on **Coaching**. He utilized a power point. Coaching is underutilized. Cincinnati uses Leadership Coaching, including Strengths Finder by the Gallup Organization. They have a program called EXCEL which meets twice a year. Other tools used include the Personal and Professional Wheel, GROW for teaching goal-setting. Craig offered to share their coaching training materials. He asked what's next for ESC- suggesting that we capitalize on ESWCC's core strength, create an ESC-wide certification, utilize shared resources and training, and adopt standards of excellence in the coaching practice. Southern California requires two full days of coaching training. Cincinnati is doing coaching for the local criminal justice staff.

David Factor spoke on **Consultant Vetting and Onboarding**. Their primary focus is on assessing emotional intelligence. They have hard and fast rules for their informational workshop. David shared a power point presentation which you can reference.

Nancy Long of 501 Commons spoke by webinar on **a self-assessment that works**. Key points: Build capacity in five areas of Governance and Boards, Fundraising and Financial Management, Communications and Relationships, Planning/Tech/Administration, and Management/Culture. She offered an online instrument which we can access. The big idea is to establish a rating, with verification. They provide recommendations on how to move from level to level. They'll provide it to ESC's at no cost but will want to check evaluations to keep brand quality up. In the future they would charge if an ESC affiliate wanted community data amalgamated. There's also a fee for the quality control process. Reach out to Nancy if you are interested in using Pathways.

Julie Crocker of ESCNE presented on **What we do best in Boston**. Julie started in January as their ED; Ulea is their Director of Consulting with primary responsibility for selling their services. They added two other programs last year. They have consultants who otherwise work for pay but do their ESC work pro bono. A task force is defining how they will describe themselves as they are now not all pro bono. Discovering What's Next is a series of workshops to help retirees or near-retirees decide what they want to do with the rest of their lives. It is not financial planning. They use a 52 page workbook. Encore Fellowships are transitional positions. Intel puts of 20-30k for ½ year full-time or 1 year part-time. ESCNE gets 5k per placement. They have an Encore Fellow running the program for them. Some nonprofits are paying the 25k cost of the program for the person they receive. Fellows are part of a cohort whether they are placed or not. Julie will provide an 11x17 document that describes this. She will help ESC's with Discovering What's Next and Encore. They also provide Navigator training, which is transition coaching.

Dr. Doyle Eiler and Troy Zeigler of ESCCO presented on the **Organizational Focus Workshop**, a new product. This is an improvement on traditional projects due to increased board and staff involvement with guidance from the ESCCO consultant facilitators. It is also a step up from most strategic planning because it is more focused and the most important actions take place within six months. ESCCO will be happy to provide more information. The program is copyrighted but will be waived for other ESC's.

*Woven among this substantial body of work were great opportunities for sharing and fellowship, with substantial participation from ESCCO consultants and Board members.*