

Consultant Vetting and Onboarding

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Friday, September 16, 2016

*Affordable coaching and consulting for nonprofits
by executives who volunteer their services*

Today's Objectives

Examine ESC Southern California's consultant vetting and onboarding process

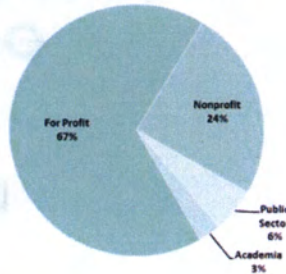
Identify important values and skills for all ESC consultants

Brainstorm ideas to improve consultant recruitment across all ESCs

Our Consultants

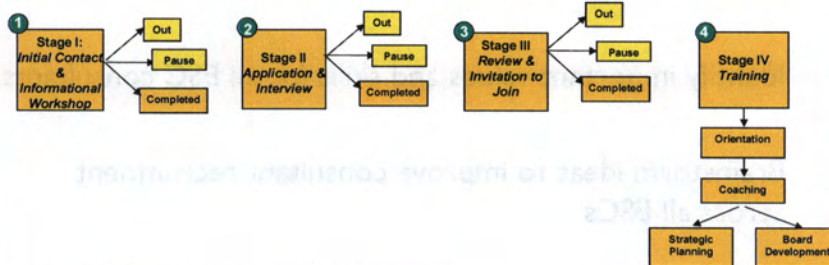
ESC is powered by a group of 100+ executive-level, highly-trained volunteer consultants who donate their time, experience and expertise to help our nonprofit clients.

Consultants by Sector



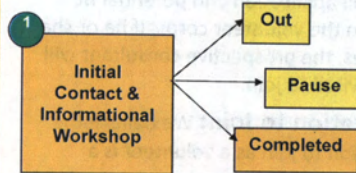
"Volunteering with ESC and ESC clients has enriched my life by making my retirement years fulfilling, challenging and rewarding. It is an honor to give back to the community by sharing my experience with our nonprofit community."
 - Leslie Horowitz, President of ESC's Consultants' Advisory Council

Consultant Onboarding



Out = Prospect not right fit or self-selects out of the process
Pause = Eligible for current stage but no response/activity, or on pause until future time

Stage I

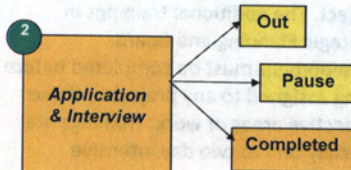


See Appendix A for ESC requirements.

i. **Initial Contact:** Following referral, all prospective consultants are screened by the Program & Client Coordinator who confirms our general criteria: experience, availability and a basic understanding of ESC's services and approach. If they pass, they are placed on a invitation list for the next scheduled informational workshop.

ii. **Informational Workshop (3 hours):** The purpose is provide an overview of ESC, our requirements and expectations (including a two-year commitment) and our coaching approach, as well provide an opportunity for senior staff and prospective consultants to get to know each other. If staff agrees there is a potential fit, prospective consultants are invited to move forward in the onboarding process.

Stage II

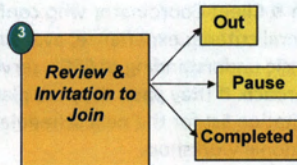


See Appendices B and C for sample application and interview report.

i. **Volunteer Application:** Prospective consultants must fill out an application form to identify their experience, skills and interests in becoming a volunteer. If they pass the application review, they are invited to meet with a current ESC consultant.

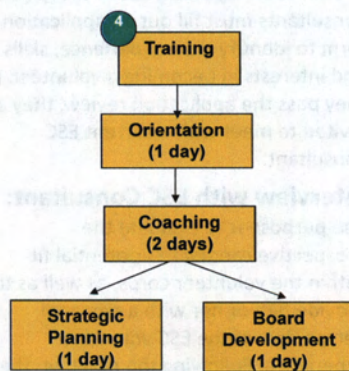
ii. **Interview with ESC Consultant:** The purpose is to evaluate the prospective candidate's potential fit within the volunteer corps, as well as to provide him or her with a personal perspective of the ESC volunteer experience. Following the meeting, the interviewer submits a conversation report on the meeting's activities.

Stage III



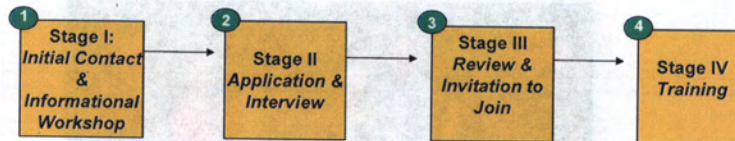
- i. **Prospect Review:** Upon receipt of the interviewer's report, senior staff reviews the prospective consultant's overall application and potential fit within the volunteer corps. If he or she passes, the prospective consultant will be invited to join.
- ii. **Invitation to Join:** We believe the decision to join as a volunteer is a mutual one. The prospective consultant must demonstrate committed interest in our mission and consulting approach.

Stage IV



- i. **Training:** All new consultants must complete Orientation and Coaching training before being assigned to any ESC project. The additional trainings in Strategic Planning and Board Development must be completed before being assigned to any project in those respective areas of work. Trainings are typically one to two day intensive workshops.

Onboarding Timeline



The onboarding process takes approximately 8-12 weeks to complete. It is an intensive process for both ESC staff and prospective consultants. It provides prospective consultants with a deep understanding of what it takes to become an ESC volunteer, and provides staff the opportunity to really get to know the prospective consultants.

Result: new consultants in our corps are wholly invested in the mission and are able to contribute in meaningful ways right from the start.

The "Ideal" Consultant



Experience

Senior management positions in their professions, with significant leadership experience and high-level content skills in key areas (planning, finance, fund development, etc.)



Availability

A significant amount of time devoted to ESC projects, trainings and events. Commitment to serve at least 16-20 hours every month to each long-term project.



Personality

Thought-partners who "guide from the side," listen and respond to the specific needs of the client. Ensures that the clients take ownership over the solutions they generate.





Thank you!

Questions? Contact me at dfactor@escsc.org.

<p>Passion</p> <p>Passion is the driving force behind a consultant's success. It is the ability to be fully engaged and committed to the work, to go above and beyond the call of duty, and to bring a sense of energy and enthusiasm to every interaction.</p>	<p>Availability</p> <p>Availability is the ability to be present and accessible to clients and colleagues. It is the willingness to be flexible and adaptable to changing circumstances, and to be able to respond quickly and effectively to any situation.</p>	<p>Expertise</p> <p>Expertise is the depth of knowledge and skill in a particular area. It is the ability to provide high-quality, specialized services that meet the needs of clients and to stay current in the field through ongoing learning and development.</p>
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Today's Purpose & Outcomes

Purpose

- Provide an overview of ESC and its approach; get to know each other

Outcomes

- Mutually decide if you should proceed into the application process to be an ESC coach

1

Expectations

• What can you expect from us?

- Great training and professional development
- Amazing and diverse projects
- Building a new network and sense of community
- Support and coaching from staff and your peers
- Serious opportunities for hard work and fun
- Knowledge of the LA nonprofit landscape
- Making a positive impact

2

Expectations

• What can we expect from you?

- Commitment to the coaching approach
- Participation in training and professional development
- Openness to growth and feedback
- Your energy, time, talents, and wisdom
- Dedication to your clients
- Confidentiality
- Adherence to ESC's conflict of interest policy
- Sincere commitment to making a positive impact
- Minimum two year commitment following completion of training

3

Next Steps

Goal: Determine mutual fit; ensure a positive consulting experience and effective service to ESC and its clients

1. **By the end of the week, we will send invitations via an online application which is due March 2, 2016.**
2. **Interview with ESC Consultant (March)**
 - Opportunity to mutually assess fit. Notified of acceptance first week of April
3. **Basic Training (5 full days)**
 - New Consultants Orientation (Wednesday, April 20)
 - Basic Training: Executive Coaching Part 1 & 2 (Thursday, April 21 & Friday, April 29)
 - Strategic Planning (Friday, May 6)
 - Board Development (TBD)
4. **Q&A**

4

Prospective ESC Consultant Application

#4



COMPLETE

Collector: Web link - Consultant App (Web Link)
Started: Friday, February 26, 2016 4:12:23 PM
Last Modified: Tuesday, March 01, 2016 11:33:22 AM
Time Spent: Over a day
IP Address: 23.242.64.107

PAGE 1

Q1: Contact Information

First Name
Last Name
Address
City
Zip
Email
Preferred Phone (note if cell)

Q2: Are you fluent in any languages other than English?

Yes,
If so, which: Czech (semi-fluent; gets better with use)

Q3: Current employment status

Fully retired

Q4: If you have a recent resume and/or biographical statement, you will be asked to email those to us after you have filled out the application. However, if you do not have a resume or bio, please provide information for your 3 most recent positions. Are you providing your work experience within this application (instead of emailing a resume or biographical statement)?

No

Q5: Most recent position:

Respondent skipped this question

Q6: Do you have another professional experience to include?

Yes

PAGE 2: Additional Work Experience (2)

Q7: Second most recent position:

Respondent skipped this question

Q8: Do you have another professional experience to include?

Respondent skipped this question

PAGE 3: Additional Work Experience (3)

Prospective ESC Consultant Application

Q9: Third most recent professional experience:

Respondent skipped this question

PAGE 4

Q10: ESC offers a wide-range of services to our clients. Most of them fall into the categories listed below. Please indicate your experience level and interest in these types of projects should you join ESC.

	Experience Level	Interest Level
Executive Coaching	Intermediate experience	High interest
Nonprofit Management		
General Management	Intermediate experience	Moderate interest
Strategic Planning	Advanced experience	High interest
Human Resources	Some experience	Low interest
Finance	Intermediate experience	Moderate interest
Organizational Development	Advanced experience	High interest
Fund Development	Some experience	Moderate interest
Board Development	Advanced experience	High interest

Please specify any specialties within these categories or provide any additional comments

To be an effective family law attorney requires the ability and patience to draw out clients and assist them to independently frame and choose future life options including financial, investment, and professional opportunities, and to move through anger and disappointment. While not technically Executive Coaching, I believe the same skills are called for.

Q11: While experience with nonprofits is not strictly mandatory, it is one way to demonstrate your familiarity with the nonprofit sector and thus your ability to work well with our clients. It is not uncommon for applicants to initially think they may not have nonprofit experience, but upon further reflection of volunteer activities, school or religious involvement, they realize they actually do. Please describe any examples of your nonprofit involvement (other than previously described as your professional work history). This can include formal and informal interactions, including volunteering or serving on boards or committees of schools, religious organizations, etc. First example:

Organization	Santa Monica Third Street Neighborhood Historic District Organizing Committee
Dates of involvement	1989 - 1990
Position/Role	Primary organizer, manager, spokesperson
Brief description	This was a grass roots community effort which successfully caused the City of Santa Monica to designate its first Historic District.

Q12: Do you have additional nonprofit experience to share?

Yes

Prospective ESC Consultant Application

Q13: Please describe your nonprofit involvement (2nd example):

Organization	Save Our Neighborhoods (SON), Santa Monica Conservancy (SMC)
Dates of involvement	2004 SON, 2004 - 2006 SMC
Position/Role	Principal spokesperson, organizer, Board Member
Brief description	SON and SMC were formed simultaneously to defeat a developer initiative to vitiate Santa Monica's Landmarks Ordinance and raise awareness of and protection for Santa Monica's architectural heritage. SON was the political arm, and successful. SMC is the on-going non-profit.

Q14: Do you have additional nonprofit experience to share? Yes

PAGE 6: Additional Nonprofit Experience (3)

Q15: Please describe your nonprofit involvement (3rd example):

Organization	Santa Monica Coalition for a Liveable City (SMCLC)
Dates of involvement	2007 - current
Position/Role	Advisor
Brief description	SMCLC focuses on issues of development, land use, government transparency in Santa Monica. A Steering Committee of Advisors governs.

Q16: Do you have additional nonprofit experience to share? Yes

PAGE 7: Additional Nonprofit Experience (4)

Q17: Please describe your nonprofit involvement (4th example):

Organization	Animal Legal Defense Fund (ALDF)
Dates of involvement	2014 - current
Position/Role	Advisor, fundraiser, new Board Member since January 2016
Brief description	ALDF uses the legal system to (1) promote legislation expanding all animal rights and protection, (2) litigate civilly and criminally against those who violate these laws, (3) expand the number of U.S. law school in which Animal Law is taught.

Q18: Do you have additional nonprofit experience to share? Yes

Prospective ESC Consultant Application

PAGE 8: Additional Nonprofit Experience (5)

Q19: Please describe your nonprofit involvement (5th example):

Organization	Gabiella Foundation; also see my resume for professional work prior to law practice, including LA Olympics
Dates of involvement	Gabiella 2014 - current; prior on resume 1965 - 1979 and 1984
Position/Role	Please see resume
Brief description	Please see resume

PAGE 9

Q20: Please describe your educational background

Undergraduate institution/Degree	University of Michigan, BA in Political Science, Political Sociology
Post-graduate institution/Degree	University of California, Berkeley, Political Sociology Graduate Work
2nd Post-graduate institution/Degree	University of California, Berkeley, Boalt Hall Law School, JD (Doctor of Law)

Q21: Please list any professional certifications

Respondent skipped this question

Q22: Please list any professional affiliations

Currently inactive member of California and Los Angeles Bar Associations

PAGE 10

Q23: Please take 3-5 sentences to describe why you are interested in working with nonprofits and what you hope to accomplish with them via ESC

Over the years non profits have increasingly taken on work once more generously funded by the public sector: community development and protection, the arts, human and animal rights, all areas historically of interest to me. ESC appears to provide an entry point and leverage opportunity to expand and strengthen the work and causes non-profits represent.

Q24: Please take 3-5 sentences to describe why the ESC approach appeals to you

ESC appears to offer a multi-faceted approach to non-profit development and operations - - i.e. structural, interpersonal, and personal - - and it apparently does so by drawing out and strengthening the capabilities of people in an organization who have on-going responsibility for the non-profit's future once ESC leaves.

Prospective ESC Consultant Application

Q25: Have you been involved in a coaching relationship? If so, briefly describe.

As noted above, family law clients confront complex personal emotional, familial, and financial issues, plans and choices for their futures. Effective legal assistance depends on a coaching relationship with the client's attorney. Helping a client to understand the emotional challenges in his/her dissolution and to frame viable alternatives for handling current and future family and money problems and choices is, I believe, at the heart of both good legal help and a coaching relationship.

Q26: Please answer the following questions:

I am available to be on projects during the work day	Yes
I am available for projects that are 12 months in length (occasional multi-week travel is acceptable)	Yes
I am willing to travel to client venues (you may specify preferred areas of LA and Orange Counties)	Yes
I am willing to make a minimum of a two-year commitment to ESC	Yes
I affirm that all information provided in this application is accurate	Yes
Additional notes and/or comments (including range for client travel, limitations, etc.)	On average I travel out of the area one long weekend per month (Thursday - Sunday) and one 3 plus/minus week out-of-the-country trip per year. I would prefer work in LA and northern counties to Orange, but am flexible as needed.

Q27: Please use this section to provide any additional information or comments you feel would be helpful to us in considering your candidacy.

I am a high energy, curious person with a wide range of interests who likes to learn new things.

Q28: How did you hear about ESC?

Prospective Consultant Interview Assessment

#1



COMPLETE

Collector: Web - Interview Report (Web Link)
Started: Tuesday, March 08, 2016 1:38:17 PM
Last Modified: Tuesday, March 08, 2016 1:51:51 PM
Time Spent: 00:13:34
IP Address: 23.120.44.205

PAGE 2

Q1: Interviewer Name

Q2: Prospective Consultant Name

Q3: Understanding of ESC and ESC Consultants

The applicant demonstrated buy-in to ESC (mission, programs/services, approach) and the role of an ESC consultant **Strongly Agree**

The applicant has respect and appreciation for the nonprofit sector and its diverse nonprofits **Strongly Agree**

The applicant understands the value of the ESC training program and will be a willing participant **Strongly Agree**

The applicant will be willing to be managed by ESC staff and the consultant project lead **Unable to Rate**

Comments and brief rationale for scoring: **NAME** has an impressive track record of involvement with various non-profits. She demonstrates a passion for contributing to others as well as a good understanding of ESC and ESC's expectations. My personal belief is that she would be easily managed by the staff and/or project Lead, but we didn't discuss this per se.

Prospective Consultant Interview Assessment

Q4: Ability to Effectively Use Coaching Modality

The applicant demonstrated the ability to listen effectively

Strongly Agree

The applicant would likely be able to help a client to think through issues instead of telling them what to do (developmental approach)

Somewhat Agree

The applicant has a clear grasp of ESC's coaching approach as opposed to expertise-based consulting or mentoring

Strongly Agree

The applicant demonstrated the likely ability to incorporate their professional experience without: 1) using it as the model for what the client should be/do, or 2) focusing on their own history, not the client's situation

Somewhat Agree

Comments and brief rationale for scoring:

NAME is an excellent active listener. She did admit during the conversation that her habit and training has been more "directive" than coaching, but indicated that she was eager to develop coaching skills. I believe she would be able to do so. Her experience as an attorney was in the area of family law. She expressed her opinion that family law required a process of active listening, guiding clients towards generating options, then leaving the ultimate decision up to the client. This approach is very similar to coaching which is why I believe she can be successful at ESC.

Q5: Ability to be Culturally Competent

The applicant would likely show respect for the unique culture, strengths, and accomplishments of a client/client org.

Strongly Agree

The applicant would likely speak a client's "language" and would not expect them to learn theirs

Strongly Agree

The applicant recognizes the importance culture plays in a nonprofit organization and demonstrates the ability to work with different organizational cultures

Strongly Agree

The applicant demonstrates the likely ability to effectively help facilitate consensus between individuals

Strongly Agree

The applicant appears inquisitive, interested in learning more about nonprofits, and growing as a consultant

Strongly Agree

Comments and brief rationale for scoring:

NAME's attributes definitely include the ability to facilitate consensus through listening and open discussion, as well as guided conversation. Again, her experience with nonprofits clearly demonstrates her interest in this sector.

Prospective Consultant Interview Assessment

Q6: Assessment of Soft Skills/Interpersonal Skills

The applicant demonstrated good communication skills	Strongly Agree
Applicant is neither too domineering nor too passive to be perceived as an effective thought-partner for a client	Strongly Agree
The applicant is flexible and would be comfortable with changes within a project, and/or be willing to change their approach within a project to be effective	Strongly Agree

Q7: Professionalism (based on overall impressions)

The applicant would likely keep their commitments regarding meetings, tasks, and deadlines	Strongly Agree
The applicant would likely pursue their project with a high degree of professionalism (attention to detail, work ethic, preparation/homework, etc.)	Strongly Agree
The applicant's dress and conduct adhere to ESC's standards	Strongly Agree

Comments and brief rationale for scoring:

NAME was on time to the meeting; she had a last minute "blip" to our previously arranged time due to an emergency but she was flexible in rescheduling, prompt with her email communication, and showed up in a timely and engaged manner.

Q8: Summary

The applicant is a good fit to be an ESC consultant	Strongly Agree
I would want to work with this applicant on an ESC project	Strongly Agree

Q9: Overall Comments:

Offer her! On top of her potential to be a good consultant with ESC, she is an imminently likeable person - able to connect quickly.

Q10: Suggestions to ESC about improving the interview and reporting process (including questions to include or exclude):	<i>Respondent skipped this question</i>
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