



# **Network Affiliates At-a-Glance**

**September 2019**

## List of Responding Affiliates (Names & Locations)

501 Commons	Seattle, WA	4
Covestro Center for Community Engagement (part of the Bayer Center for Nonprofit Management at Robert Morris University)	Pittsburgh, PA	6
Empower Success Corps	Boston, MA	8
ESC of Central Oklahoma	Oklahoma City, OK	10
ESC of the Greater Triangle	Durham, NC	12
ESC of Houston	Houston, TX	14
ESC of Southern California	Los Angeles, CA	16
National Executive Service Corps	New York, NY	18
OneSource Center for Nonprofit Excellence	Cincinnati, OH	20
South Florida Institute on Aging (SoFIA)	Fort Lauderdale, FL	22

## ESC-US Network Statistics\*



**1,303**  
Clients



**1,964**  
Projects



**1,242**  
Consultants



**55,149**  
Hours

**93**

Full Time Staff

**30**

Part Time Staff

**\$90,000 - \$6.7 million**  
Current FY Budgets

**\$50/hour - \$225/hour**  
Consultants' Hourly Value

\*Network-wide statistics reflect aggregate data for responding affiliates.

# ESC-US Affiliate Trends & Information\*\*

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## Revenue Sources

- All responding affiliates list Fees for Service as a revenue source; 90% list it as a Primary source
  - Second most commonly listed Primary source of revenue is Foundation Support (55%)
  - Government Support and Fundraising Events were the least commonly reported revenue sources
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## Client & Project Information

- Responding affiliates reported between 18% - 75% of their business came from repeat clients
  - Most responding affiliates reported more Projects than Clients in 2018, indicating that several clients completed multiple projects with their respective ESCs
  - 90% of responding affiliates have some form of standard project evaluation process.
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## Consultant Training

- 90% of responding affiliates offer some form of initial training/onboarding for Consultants prior to their first assignment; 90% also offer continuing education/ongoing training opportunities
  - Though most respondents offer these trainings, specific lengths, topics, and formats vary
  - 75% of respondents review consultant performance, though process formality varies by affiliate
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## Consultant Diversity & Demographics

- All responding affiliates track Consultant diversity; 100% track Gender, 90% track Race/Ethnicity
  - Other characteristics include: age, sexual orientation, disability, language, and employment status
  - 90% of responding affiliates have an active/ongoing initiative to increase Consultant diversity
  - Responding affiliates reported between 25% - 90% of their Consultants being fully retired
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## Areas of Programming & Services

- All responding affiliates offer Consulting Services as an area of programming; most also offer Individual/Executive Coaching, Training Workshops/Seminars, and Meeting/Retreat Facilitations
  - Within Consulting Services, all responding affiliates offer Strategic Planning and Governance/Board-related services; most also offer Organizational Assessments and Succession Planning
  - All responding affiliates offer additional services/resources to clients on a case-by-case basis
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## Internal & External Challenges

- 90% of responding affiliates expressed challenges related to staffing (turnover, structure, etc.); several also cited Consultant recruiting, retention, and turnover as an area of concern
- Communicating ESC's value (to potential clients and funders) was also a common theme

\*\* Trends do not include information from SoFIA, which re-launched its ESC program in late 2018.

# 501 Commons

Seattle, WA

www.501commons.org

Service Area: 45,000 nonprofits

Kerry Kozuki

Director, Management Consulting & Services

(206) 724-1722

kerry@501commons.org

*Mission: We all rise when nonprofits thrive. 501 Commons serves nonprofits as experts, innovators, and partners. Our passion is to amplify the strengths of nonprofits—so people and communities flourish.*

**\$6,778,976** Current FY Budget

## Primary Revenue

Fees for Service  
Foundations

## Secondary Revenue

Corporate  
Government  
Individual Gifts  
Fundraising Events

**45**

Full Time

Staff

**10**

Part Time

**724** Clients Served (2018)

**75%** Repeat Business

**1,181** Projects (2018)



Standardized Evaluation Process

**550** Volunteer Consultants

**30%** Regularly Used/Assigned

**30%** Fully Retired

**7,234** Volunteer Hours (2018)

Hourly Value: **\$175**

## Consultant Training



Initial Training/Onboarding



Ongoing/Continuing Education

## Consultant Diversity



Track Diversity of Consulting Corps



Active/Ongoing Diversity Initiative

## Areas of Programming

- Coaching — Individual/Executive
- Consulting Services
- Meeting/Retreat Facilitation
- Training Workshops/Seminars
- Other: Regional Giving Day (Give BIG Seattle)

## Standard Consulting Services

- Governance/Board Development
- Human Resources
- IT/ Technology Infrastructure
- Marketing/Communications
- Organizational Assessment
- Program Planning/Evaluation
- Strategic Planning
- Succession Planning
- Other: Financial Services

# 501 Commons

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## Points of Pride

- Assumed responsibility for GiveBIG Seattle 2019 (regional giving day) - generated over \$11M
- Successfully expanded HR services to Portland metro region; now growing HR employee team
- Facilitated numerous multidisciplinary spin-off programs/organizations from larger entities, and provided capacity building services to these newly formed/stand-alone agencies
- National demand for Climate Survey and Five Elements Assessment; developing easily replicable report templates has ensured positive net margins

### New Programs Launched

- ESC Leadership Council and replicating the Fair Chance program from Washington, D.C.
- Internal and External DEI Initiatives, including an internal DEI audit and training/ongoing coaching for several staff to be able to lead DEI facilitations for clients

### External Awards/Recognition

- One of four WA organizations to receive a \$100K grant from the Satterberg Foundation to fund 3-month CEO sabbatical and significant staff training/learning opportunities

### Unique/Noteworthy Project

- GiveBIG Seattle - Required a great deal of organizational lift, including collaboration with major media outlets and sponsors, to create the systems and procedures that allowed us to effectively market the day and receive and disburse \$11M. Helps message to the local and regional nonprofit community the essential nature of our inclusion in its ecosystem.

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## Challenges

### Internal

- Staffing in an increasingly high cost region.
- Employee retention, especially that of technology staff.

### External

- Continued escalation of cost of living, which drives up demand for higher wages
- Increasing need to be very fluent in diversity, equity, and inclusion (DEI) practices
- Demonstrating we are still an appropriate/effective resource for small nonprofits, especially those based in communities of color and/or underserved communities

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### What could you teach other affiliates?

We would be pleased to share anything that would help other affiliates learn. In turn, we would be grateful to learn best practices of other affiliates. We hope affiliates are open to teaming up with others that have subject matter expertise for projects they may not normally have the capabilities to complete.

# Covestro Center for Community Engagement

**Pittsburgh, PA**  
 www.rmu.edu/covestro

Service Area: 8,500 nonprofits

**Yvonne VanHaitsma**  
 Associate Director  
 (412) 397-6002  
 vanhaitsma@rmu.edu

*Mission: The Covestro Center for Community Engagement (CCCE), part of the Bayer Center for Nonprofit Management at Robert Morris University, provides a structured, engaging way for businesses and nonprofits to build meaningful connections that exchange purpose and value. A sturdy bridge between sectors makes for a bright future.*

**\$150,000** Current FY Budget

**68** Volunteer Consultants  
**80%** Regularly Used/Assigned  
**25%** Fully Retired

Primary Revenue      Secondary Revenue  
 Fees for Service      Foundations  
    Corporate

**1,500** Volunteer Hours (2018)  
 Hourly Value: **\$60**

**2** Staff      **2**  
 Full Time      Part Time

- Consultant Training
- Initial Training/Onboarding
  - Ongoing/Continuing Education

**65** Clients Served (2018)  
**30%** Repeat Business

- Consultant Diversity
- Track Diversity of Consulting Corps
  - Active/Ongoing Diversity Initiative

- 70** Projects (2018)
- Standardized Evaluation Process

**Areas of Programming**

- Coaching — Individual/Executive
- Consulting Services
- Meeting/Retreat Facilitation
- Training Workshops/Seminars

**Standard Consulting Services**

- Governance/Board Development
- Human Resources
- IT/ Technology Infrastructure
- Marketing/Communications
- Mergers/Acquisitions
- Organizational Assessment
- Program Planning/Evaluation
- Strategic Planning
- Succession Planning

# Covestro Center for Community Engagement

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## Points of Pride

- Worked with 200 Boards and 900 newly trained Board members through BoardsWork! program
- Made consulting revenue goal!
- Recruited new corporate partners and trained other states with SkillShare program
- Worked with 25 organizations through our new Ready to Compete program

### New Programs Launched

- Ready to Compete program, funded by the BNY Mellon Foundation with a \$225,000 grant
  - Two cohorts: Finance (12 nonprofits) and HR management (13 nonprofits)
  - Worked with 501 commons for assessment of skill areas
  - ESC Consultant or other skilled professional worked with participants for 12 weeks

### Unique/Noteworthy Project

- Ran a training program -- supervisory program for a large nonprofit, and were hired to complete the same program again. Initially we're sure about fit, but pushed through to deliver a fabulous program.

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## Challenges

### Internal

- Continuing to adjust to fewer paid staff and stretched resources at the university
- Held about 65 volunteers (more turnover than past years)

### External

- Blessing and challenge of having former ED's become consultants
- Political climate, general turmoil in the nonprofit sector, and a possible recession
- More DEI work will be good!

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## Areas of Expertise

- BoardsWork! retreat facilitation & SkillShare project facilitation with companies
- Human resources consulting
- Financial management consulting
- Training-- especially supervisory
- Strategic planning/ thinking

### What could you teach other affiliates?

We have a good model for board training, board retreats, and matching. We also use our volunteers to advise corporate project teams.

# Empower Success Corps

**Boston, MA**

www.empowersuccesscorps.org

Service Area: 45,000 nonprofits

**Julie Crockford**

President

(617) 357-5550

jcrockford@empowersuccesscorps.org

***Mission:** To enhance the impact of nonprofit organizations through high-quality, affordable capacity-building services including consulting, implementation support, and professional development provided by experienced professionals dedicated to serving the New England community.*

**\$650,000** Current FY Budget

## Primary Revenue

Fees for Service

**4**

Full Time

## Secondary Revenue

Foundations  
Individual Gifts

**6**

Part Time

Staff

**109** Clients Served (2018)

**25%** Repeat Business

**118** Projects (2018)

Standardized Evaluation Process

**170** Volunteer Consultants

**70%** Regularly Used/Assigned

**60%** Fully Retired

**14,850** Volunteer Hours (2018)

Hourly Value: **\$175**

## Consultant Training

- Initial Training/Onboarding
- Ongoing/Continuing Education

## Consultant Diversity

- Track Diversity of Consulting Corps
- Active/Ongoing Diversity Initiative

## Areas of Programming

- Coaching — Individual/Executive
- Consulting Services
- Executive Search/Interim Placement
- Meeting/Retreat Facilitation

## Standard Consulting Services

- Fund Development
- Governance/Board Development
- Human Resources
- Marketing/ Communications
- Mergers/ Acquisitions
- Organizational Assessment
- Program Planning/ Evaluation
- Strategic Planning
- Succession Planning
- Other: Business & Financial Planning



# Empower Success Corps

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## Points of Pride

- Successfully transitioned a major leadership position by replacing a long-tenured former Director of Consulting with a new Vice President who oversees consulting and technology
- Improved use of Salesforce to track consultants/leads/projects and help with matchmaking
- Initiated 75 new consulting projects from October 1, 2018 to September 1, 2019
- Made progress on DEI goals; required candidate pools for new hires include diverse applicants
- Two Nonprofit Executive RoundTables - facilitated monthly peer-coaching cohorts of 6-8 executive directors - have continued after initial 9-month period; one is starting their 3rd year!

### New Programs Launched

- ESC Discovery Program - in early stages of launching at 6 Councils on Aging/Senior Centers, which will include seminars on finding purpose and on-site help (from a trained volunteer peer, called a Transition Navigator) to find a meaningful volunteer role in the community.
- Worked on developing our ESC values, including reviewing our ESC colleagues' websites! Final phrases/concepts are currently being refined.

### External Awards/Recognition

- Undertook a 2-year process for certification as a Service Enterprise. Our Points of Light certifier felt we could present at their conference on our success with Skill-Based Volunteering and thinking outside the box to advance volunteering by utilizing SEI.
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## Challenges

### Internal

- Replacing our long-term Director of Consulting
- Finding enough consultant "leads" for project teams - no one wants to take the helm
- Despite increased efforts to spread the word about us, our name recognition is low

### External

- Clients' tightening budgets - even our sliding-scale fees are too much. Price negotiations result in decreased average project fees, which is not sustainable.
  - Foundation/corporate funder interest in supporting the type of capacity building we do
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## Areas of Expertise

- Consulting - Strategic planning; business/finance/operations planning; governance/Board retreats
- ESC Discovery (funding from MA Councils on Aging and a foundation supported launch)
- Internal financial recording and reporting system
- Involving program managers in organizational goal setting and budget planning

# ESC of Central Oklahoma

**Oklahoma City, OK**

www.escco-online.org

Service Area: 3,000 nonprofits

**Wendi Wilson**

Vice President

(405) 526-2317

wendi@escco-online.org

*Mission: To provide professional volunteer management consulting and support services to nonprofit organizations, schools, and government agencies.*

**\$90,000** Current FY Budget

Primary Revenue

Fees for Service  
Foundations  
Individual Gifts

Secondary Revenue

Corporate

**0**

Full Time

Staff

**2**

Part Time

**12** Clients Served (2018)

**25%** Repeat Business

**20** Projects (2018)

Standardized Evaluation Process

**25** Volunteer Consultants

**90%** Regularly Used/Assigned

**90%** Fully Retired

**1,250** Volunteer Hours (2018)

Hourly Value: **\$50**

Consultant Training

- Initial Training/Onboarding
- Ongoing/Continuing Education

Consultant Diversity

- Track Diversity of Consulting Corps
- Active/Ongoing Diversity Initiative

**Areas of Programming**

- Coaching — Individual/Executive
- Consulting Services

**Standard Consulting Services**

- Fund Development
- Governance/Board Development
- Marketing/Communications
- Mergers & Acquisitions
- Organizational Assessment
- Program Planning/Evaluation
- Strategic Planning
- Succession Planning

# ESC of Central Oklahoma

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## Points of Pride

- Continued to fulfill our mission of service, bringing quality enhancements to a dozen clients.
- Conducted an in-depth internal assessment to ensure our continued operation.
- As a result of the internal assessment, we made major changes in staffing levels, volunteer roles and responsibilities, and committee structure, resulting in a 40% budget reduction
- Relocated offices to a superior space, further reducing budget by 10%
- Selected and hired new Executive Director and implemented transition process

### Unique/Noteworthy Project

- First state-wide project: helping the Oklahoma Charitable Clinics Association plan its future. This vital organization aligns 60 clinics across the state which provide services to the economically disadvantaged.

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## Challenges

### Internal

- A number of consultants have moved on to other interests or aged out. Our initiative to recruit new consultants includes a joint publicity campaign with RSVP and SCORE.

### External

- Financial hardships for clients and potential clients continue to increase in our community.

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## Areas of Expertise

- Organizational Focus Workshop - incredible success that has changed our ability to serve, as well as how we are perceived in the community.
- Newly re-balanced staff/volunteer roles and responsibilities (game-changer for sustainability)
- We continue to listen closely to the needs of the nonprofit community in general and tailor our program offerings accordingly. We average one new product offering per year.

### What could you teach other affiliates?

To approach their own operations like they were an ESC project and bring the same level of questioning and problem-solving to bear on themselves.

# ESC of the Greater Triangle

**Durham, NC**

www.esctriangle.org

Service Area: 9,000 nonprofits

**Michael Williams**

Executive Director

(919) 605-8822

michael@esctriangle.org

***Mission:** To help nonprofits achieve their missions. We match nonprofits with executive-level volunteers who provide high-quality, affordable consulting and capacity building services.*

**\$264,000** Current FY Budget

## Primary Revenue

Fees for Service

**3**

Full Time

Staff

**0**

Part Time

## Secondary Revenue

Foundations  
Corporate  
Individual Gifts

**77** Clients Served (2018)

**25%** Repeat Business

**93** Projects (2018)

Standardized Evaluation Process

**72** Volunteer Consultants

**80%** Regularly Used/Assigned

**33%** Fully Retired

**1,900** Volunteer Hours (2018)

Hourly Value: **Varies**

## Consultant Training

- Initial Training/Onboarding
- Ongoing/Continuing Education

## Consultant Diversity

- Track Diversity of Consulting Corps
- Active/Ongoing Diversity Initiative

## **Areas of Programming**

- Coaching — Individual/Executive
- Consulting Services
- Executive Search/Interim Placement
- Meeting/Retreat Facilitation
- Training Workshops/Seminars

## **Standard Consulting Services**

- Governance/Board Development
- Human Resources
- Marketing/Communications
- Mergers/Acquisitions
- Organizational Assessment
- Program Planning/Evaluation
- Strategic Planning
- Succession Planning

# ESC of the Greater Triangle

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# ESC of Houston

## Houston, TX

www.execservicecorphouston.org

Service Area: 20,000+ nonprofits

## James (Jim) Rather Sr.

Program Administrator

(281) 773-3597

ratj@comcast.net

*Mission: To help nonprofits build capacity – increase effectiveness as well as efficiency – and through them, improve the quality of life in greater Houston area.*

**\$150,000** Current FY Budget

### Primary Revenue

Foundations

### Secondary Revenue

Fees for Service  
Corporate  
Individual Gifts

**1**

Full Time

Staff

**0**

Part Time

**100** Clients Served (2018)

**50%** Repeat Business

**200** Projects (2018)

Standardized Evaluation Process

**30** Volunteer Consultants

**30%** Regularly Used/Assigned

**85%** Fully Retired

**7,000** Volunteer Hours (2018)

Hourly Value: **\$100**

### Consultant Training

- Initial Training/Onboarding
- Ongoing/Continuing Education

### Consultant Diversity

- Track Diversity of Consulting Corps
- Active/Ongoing Diversity Initiative

## Areas of Programming

- Consulting Services
- Meeting/Retreat Facilitation
- Training Workshops/Seminars

## Standard Consulting Services

- Governance/Board Development
- IT/ Technology Infrastructure
- Organizational Assessment
- Strategic Planning

# ESC of Houston

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## Points of Pride

- Initiated a Fundraising Seminar.
- Strategic Plan for Montgomery County Food Bank (\$8,000 project)
- Continued offering our standard services, including Board retreats, Planning, Seminars and the University of Houston program

### New Programs Launched

- Fundraising Seminar, which was a prelude to the consulting package built this year

### Unique/Noteworthy Project

- Built a consultancy around Fundraising Planning
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## Challenges

### Internal

- Volunteer ED that works 3 days (at the office) per week
- Newly hired Office Manager turned out to be divisive and did not perform well
- Major fundraiser and force in the community died from cancer

### External

- Being able to state our value meaningfully when being asked to prove outcomes
  - Having a volunteer ED does not project "Strength" of the organization
  - Board Chair (a consultant) just took an eight month engagement in Germany
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## Areas of Expertise

- Strategic Planning
- Board related activities
- Active Seminars programs
- University of Houston Program—allows teams of students, under faculty supervision and with the mentorship of ESC Consultants, to provide innovative technology solutions to nonprofits

# ESC of Southern California

Los Angeles, CA

www.escsc.org

Service Area: 33,000 nonprofits

David Factor

President & CEO

(213) 613-9103 x11

dfactor@escsc.org

*Mission: To empower nonprofits to achieve their missions through affordable coaching and consulting by trained executive-level volunteers.*

**\$1,200,000** Current FY Budget

## Primary Revenue

Fees for Service  
Foundations  
Individual Gifts

## Secondary Revenue

Corporate  
Government

**9**

Full Time

Staff

**4**

Part Time

**136** Clients Served (2018)

**55%** Repeat Business

**180** Projects (2018)

Standardized Evaluation Process

**115** Volunteer Consultants

**75%** Regularly Used/Assigned

**70%** Fully Retired

**11,595** Volunteer Hours (2018)

Hourly Value: **\$225**

## Consultant Training



Initial Training/Onboarding



Ongoing/Continuing Education

## Consultant Diversity



Track Diversity of Consulting Corps



Active/Ongoing Diversity Initiative

## Areas of Programming

- Coaching — Individual/Executive
- Consulting Services
- Training Workshops/Seminars
- Other: Custom Cohorts (third-party funded)

## Standard Consulting Services

- Fund Development
- Governance/Board Development
- Strategic Planning
- Other: Customized Consulting Projects



# ESC of Southern California

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## Points of Pride

- Launched newly redesigned website
- Received 3-year, \$225,000 capacity building grant from the W.M. Keck Foundation
- Successfully restructured staff to reflect continuing organizational growth and development
- Re-activated Board Business and Fund Development Committees, in alignment with staff needs

### New Programs Launched

- Two new contract models—retainer (allows ongoing, post-project implementation support) and “not-to-exceed” (allows for additional services, up to certain dollar amount)
- Re-launched Project Evaluation Initiative after a year-long hiatus and redesign process

### Unique/Noteworthy Project

- 18-month, \$150,000 "not-to-exceed" contract with a large homeless services provider. A project kick-off meeting (with the CEO) helped consultants understand client's programs, structure, goals, and recent legislation that dramatically increased funding. We are now leading the alignment of non-ESC consultants to drive macro-level change and outcomes.

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## Challenges

### Internal

- Growing pains from staff restructuring, including the outsourcing of HR/payroll functions
- Keeping program expenses under control, while meeting/exceeding revenue targets
- More episodic-than-anticipated cycle of funding for Custom Cohort projects

### External

- Changing philanthropic/funder priorities, including increased focus on DEI requirements and channeling money toward issues surrounding homelessness/homeless services
- Upcoming census and election have clients (and those they serve) on edge

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## Areas of Expertise

- Customized Consulting Projects
- Institutes (year-long, cohort-based training programs) - one for EDs, one for Fund Development
- Sponsorship Grants (allow funders to ‘underwrite’ part of clients’ project fees)
- Vetting, onboarding, and training of new consultants

### What could you teach other affiliates?

We are happy to share any information that might be useful, and feel well-positioned to share about our new consultant training program, cohort-based programs with funders, how we track consultants’ volunteer hours (Service Log), and how we transition consultants out of our Active Corps (Emeritization).

# National Executive Service Corps

**New York, NY**

www.nesc.org

Service Area: 5,300 nonprofits

**Michael Towers**

CFO and Chief Administrative Officer

(646) 452-7229

mtowers@nesc.org

*Mission: To strengthen and empower the management of nonprofit organizations, schools and government agencies by providing high-quality, affordable consulting services.*

**\$450,000** Current FY Budget

## Primary Revenue

Fees for Service  
Fundraising Events

## Secondary Revenue

Foundations  
Individual Gifts

**9**

Full Time

Staff

**1**

Part Time

**25** Clients Served (2018)

**75%** Repeat Business

**25** Projects (2018)

Standardized Evaluation Process

**120** Volunteer Consultants

**30%** Regularly Used/Assigned

**70%** Fully Retired

**4,320** Volunteer Hours (2018)

Hourly Value: **\$225**

## Consultant Training

- Initial Training/Onboarding
- Ongoing/Continuing Education

## Consultant Diversity

- Track Diversity of Consulting Corps
- Active/Ongoing Diversity Initiative

## Areas of Programming

- Consulting Services
- Executive Search/Interim Placement

## Standard Consulting Services

- Governance/Board Development
- Organizational Assessment
- Strategic Planning
- Succession Planning

# National Executive Service Corps

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## Points of Pride

- Election of new Board Chair and President, both who have deep past affiliations with ESC
- Continued success with new projects in Connecticut; Executive Search is strong
- Ongoing expense controls have resulted in a stable and workable operating environment

### New Programs Launched

- Baruch University Partnership
  - Fosters inter-generational profile and creates a mentoring program for MBA students
  - Strengthening student interest in nonprofit leadership and guides development of consulting skills while supporting our digital marketing footprint
- Developing library of resources on leadership topics across a spectrum of nonprofit needs

### External Awards/Recognition

- 60% repeat business ; clients consistently reach out to us as a result of our reputation.

### Unique/Noteworthy Project

- Completed two shared services-related projects, one with a public sector client in Westport and another with a consortium of healthcare agencies in Long Island.

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## Challenges

### Internal

- Change in leadership midyear (Board Chairman and President)
- Difficulty replacing key personnel, but have maintained cost control efforts
- Steady erosion of new projects in New York & New Jersey

### External

- Need to understand if our business model is still viable

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## Areas of Expertise

- External services - Executive search and strategic planning projects
- Robust digital data base of projects and continued implementation of Salesforce
- Using idled staff to develop “products” for consumption by our digital readers

### What could you teach other affiliates?

We have a very deep bench and expertise in Executive Search and Coaching, Board Development, and Strategic Planning; all of which could be valuable to other ESCs. A large part of our business is executive search, so we have insight in this space from years of experience.

# OneSource Center for Nonprofit Excellence

<p><b>Cincinnati, OH</b>          www.onesourcecenter.org          Service Area: 10,000 nonprofits</p>	<p><b>Christine Brown</b>          Chief Executive Officer          (513) 554-4944          cbrown@onesourcectr.org</p>
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*Mission: We are a resource center providing services, products, and connections to strengthen the impact of nonprofits serving the Greater Cincinnati community.*

**\$170,000** Current FY Budget

<u>Primary Revenue</u>	<u>Secondary Revenue</u>
Fees for Service Foundations	Corporate Individual Gifts

<div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">2</div> <p>Full Time</p>	Staff	<div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">3</div> <p>Part Time</p>
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**55** Clients Served (2018)  
**18%** Repeat Business

**77** Projects (2018)  
 Standardized Evaluation Process

**92** Volunteer Consultants  
**88%** Regularly Used/Assigned  
**57%** Fully Retired

**5,500** Volunteer Hours (2018)  
 Hourly Value: **\$150**

Consultant Training

- Initial Training/Onboarding
- Ongoing/Continuing Education

Consultant Diversity

- Track Diversity of Consulting Corps
- Active/Ongoing Diversity Initiative

**Areas of Programming**

- Coaching — Individual/Executive
- Consulting Services
- Executive Search/Interim Placement
- Meeting/Retreat Facilitation
- Training Workshops/Seminars
- Other: Furniture Marketplace
- Other: Young Professionals Program
- Other: Community Calendar

**Standard Consulting Services**

- Governance/Board Development
- Human Resources
- Marketing/Communications
- Mergers/Acquisitions
- Organizational Assessment
- Program Planning/Evaluation
- Strategic Planning
- Succession Planning
- Other: Business Solutions

# OneSource Center for Nonprofit Excellence

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## Points of Pride

- “Building Blocks for Nonprofits” (monthly seminars) very successful and now offered on-site; topics have included strategic planning, fundraising/grant-writing, HR skills, and marketing/PR.
- Increased volunteer resources, including monthly Consultant Newsletters and a Toolbox/Toolkit
  - Includes historical project database, subject matter reference materials/experts, model project forms, library index, and copyright best practices guidelines
- Continued successful transition from ESCC to OneSource Center for Nonprofit Excellence

### New Programs Launched

- Organizational Capacity Assessments - high-level assessment of strengths and growth areas, including recommendations for moving forward/next steps
- Grant Writing Workshop—provides one-on-one assistance with common grant applications

### Unique/Noteworthy Project

- Piloted a 3-month workshop series, “Mapping the Way to Organizational Excellence,” for ~130 recipients of People’s Liberty grants. Workshops were designed to empower grantees with tools to take a concept to implementation, with individual coaching offered between sessions. We convened a Task Force to thoroughly review our consulting project workflow, which resulted in a substantially refined process with multiple touchpoints for quality control, follow up for impact analysis, forms for completion at all stages, and a flow chart.

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## Challenges

### Internal

- Staff turnover (new Director and Manager of Consulting Services)
- Funding challenges (key grant not renewed)
- Cultivating new projects/business

### External

- Increased competition for business and fundraising

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## Areas of Expertise

- Strategic planning, Board development, leadership training , executive coaching, and interviewing
- Internal consulting project workflow process
- Volunteer engagement and appreciation measures (spearheaded by volunteers)

### What could you teach other affiliates?

OneSource Center is happy to share information about its consulting, coaching and training services/ processes, as well as our other offerings to strengthen area nonprofits' impact.

# South Florida Institute on Aging (SoFIA)

**Fort Lauderdale, FL**

www.thesofia.org

Service Area: 1,000 nonprofits

**Rhonda Banker**

SoFIA Fellows Program Manager

(954) 484-7117

rbaner@thesofia.org

*Mission: SoFIA improves economic and social insights and services to empower people as they age.*

**\$2,600,000** Current FY Budget

Primary Revenue

Foundations  
Government

Secondary Revenue

Fees of Service  
Corporate  
Individual Gifts  
Fundraising Events

**18**

Full Time

Staff

**2**

Part Time

**n/a** Clients Served (2018)

**n/a** Repeat Business

**n/a** Projects (2018)

Standardized Evaluation Process

**n/a** Volunteer Consultants

**n/a** Regularly Used/Assigned

**n/a** Fully Retired

**n/a** Volunteer Hours (2018)

Hourly Value: **n/a**

Consultant Training

Initial Training/Onboarding

Ongoing/Continuing Education

Consultant Diversity

Track Diversity of Consulting Corps

Active/Ongoing Diversity Initiative

**Areas of Programming**

- Coaching — Individual/Executive
- Executive Search/Interim Placement
- Training Workshops/Seminars

**Standard Consulting Services**

- N/A - Our services differ from the traditional consulting model in that we train and place older adults into internships in nonprofits.

# South Florida Institute on Aging (SoFIA)

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## Points of Pride

- SoFIA Fellows Program launch - designed to harness the power of an older workforce to help nonprofit organizations of South Florida achieve their mission. South Florida nonprofits will have access to the database should they seek to hire a Fellow or post a position. And all benefit from a greater social network, community participation and a sense of fulfillment.
- Hired Program Manager to support SoFIA Fellows Program