

# 2020 Annual Report

A Year of Innovation, Change and Adaptation



Barrington Public Library Strategic Planning Meeting



617.357.5550



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# LETTER FROM THE BOARD CHAIR AND PRESIDENT

This past year has been one like no other. Due to the pandemic, we closed the physical doors to the ESC office on Federal Street in March of 2020 and made the transition to working remotely. While many of our clients were able to continue working on projects with their ESC consulting team, others needed to pause or not move forward due to the uncertainty they faced.

Like our clients and nonprofits across the country, ESC had to learn to adapt, pivot and adjust to this new, virtual world. The staff quickly embraced Zoom which served as a lifeline to keep us connected and working collaboratively. We set on a path to ensure that all of our consultants and fellows were also equipped with the skills and knowledge to conduct business virtually.

From May to December, ESC's virtual technology team facilitated more than 30 training sessions – from “Mastering Zoom” to “How to Develop—and Apply—Cultural Competence/Cultural Humility to Virtual Meetings” – and had more than 250 attendees at these trainings.

To serve our clients during this tumultuous time, we stayed up to date on trends and developments in the nonprofit sector. We disseminated guidance on how to apply for the Payment Protection Program and offered to assist clients in completing their applications. A team of consultants reached out to an array of past clients offering three hours of pro bono consulting to help address any immediate needs as a result of the pandemic.



Bonnie Clendenning, Board Chair



Julie Crockford, President



# LETTER FROM THE BOARD CHAIR AND PRESIDENT

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We charged a core team of staff and consultants with reinventing our business model from primarily in-person to a virtual or hybrid model. They spent the subsequent five months exploring how best to expand ESC's virtual reach, develop the core competencies of our corps of consultants, and onboard ESC's newest volunteers – both consultants and fellows – to ensure success.

After a hiatus ourselves, we continued with our own strategic planning process and identified four key goals including: reinventing our service delivery model to work successfully in a virtual or hybrid setting; increasing our visibility; enhancing our governance; and focusing on programs and initiatives that assure financial sustainability. Teams comprised of staff and consultants have mapped out objectives, action items, and timelines to keep us moving forward. We will periodically keep you abreast of our progress.

Although this has been a year marked by challenges, we have seen many bright spots. ESC consultants have worked with 113 organizations, our fellows were embedded at seven nonprofits and we had four Nonprofit Executive RoundTables meeting for much of the year. The physical distance has encouraged us to find ways to connect more often. Our staff meets more regularly, and we have made a concerted effort to offer programs where we can meet up virtually including our DEI trainings and discussions, weekly water coolers, Zoom trainings, and our Lunch and Learn series.

Last but certainly not least, we would like to thank you, our steadfast supporters. Thank you to our nonprofit clients who continue to work diligently to make their communities better. To our committed and passionate consultants and fellows; our dedicated Board of Directors; our faithful, tried and true staff; and our generous, big-hearted donors; we so appreciate your commitment to helping nonprofits throughout New England succeed.

With gratitude,

*Bonnie Clendenning, Board Chair*  
*Julie Crockford, President*



Bonnie and Julie

# OUR MISSION

Our mission is 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.

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**Christine Warren**  
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**Former Staff**  
Rachel Birkenthal, David Guydan, Miles Robinson



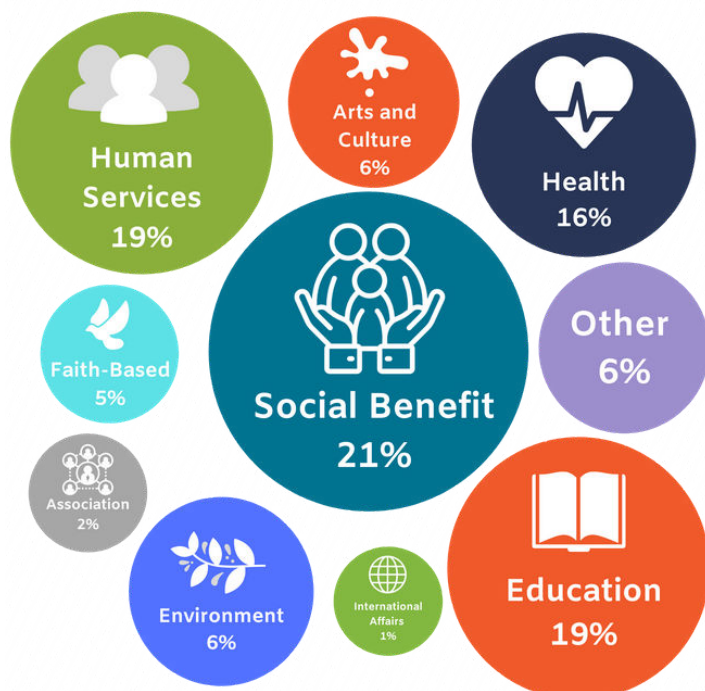
ESC Staff

# MEET OUR CLIENTS

We serve a diverse array of nonprofit organizations as well as, schools, libraries, and associations. From small, grass roots organizations to multi-million dollar human services organization, ESC helps nonprofits build capacity and maximize their positive impact in the community. Below is the list of clients FY2020, October 1, 2019 through September 30, 2020

15 40 Connection **C**  
 Abbott Library **C**  
 Addgene **C**  
 American Fund for Charities **C**  
 Amesbury Council on Aging **D**  
 Apprentice Learning **C**  
 Art Connection Rhode Island **F**  
 Aspire Living & Learning (formerly The Institute of Professional Practice, Inc.) **F**  
 Ausbon Sargent Land Preservation Trust **C**  
 Ayer Public Access Corporation **C**  
 BAMSI **C**  
 Barrington Public Library **C**  
 Bikes Not Bombs **C**  
 Camp Fire North Shore, Inc **C**  
 Camp Ramah in New England **C**  
 Children's Room **C**  
 Community Health Network Area 15 **C**  
 Consequence Magazine **C**  
 Dartmouth Council on Aging **D**  
 Dighton Public Library **C**  
 DOVE, Inc. **C**  
 Duxbury Council on Aging **D**  
 EcoTarium **C**  
 Elizabeth Stone House **C**  
 Empower Her Inc. **C**  
 Empower Schools **F**  
 Facing History and Ourselves **C**  
 Family & Children's Service of Greater Lynn **C**  
 Farmsteads of New England **C**  
 Fenway Community Center **C**  
 First Congregational Church in Winchester **C**  
 First Literacy **C**  
 First Parish of Norwell **C**  
 Foodicine Health **C**  
 FORWARD Friends Or Relatives With Autism & Related Disabilities **C**  
 Foundation for MetroWest **C**  
 Framingham Public Schools **C**  
 Generations Incorporated **F**  
 Granada House **C**  
 Grimes-King Foundation for the Elderly **C**  
 Hope House **C**  
 Hyde Square Task Force **C**  
 Jamestown Philomenian Library Foundation **C**  
 Jumpstart for Young Children **F**  
 Kripalu Center for Yoga & Health **F**  
 Lawyers Concerned for Lawyers **C**  
 Lexington Global Warming Action Coalition **C**  
 Mass Union of Public Housing Tenants **C**  
 Massachusetts Association of 766 Approved Private Schools **C**  
 Massachusetts Council on Aging **D**  
 Massachusetts Council on Gaming and Health **F**  
 Massachusetts Service Alliance **C**  
 Massachusetts Veterinary Medical Association **F**  
 Maverick Landing Community Services **C**  
 METCO **C**  
 Momental Foundation FKA Mistletoe Foundation **C**  
 Multi-Service Eating Disorders Association, Inc. **C**  
 My Turn **C**  
 National Organization for Rare Disorders **C**  
 Neponset River Watershed Association **C**  
 New England Employee Benefits Council **C**  
 New England Kurn Hattin Homes for Children **C**  
 New Garden Park, Inc. **F**  
 New Hampshire Peace Action **C**  
 North End Waterfront Health **C**  
 Open Table **C**  
 People Helping People **C**  
 Physician Health Services, Inc. **C**

## Clients By Sector

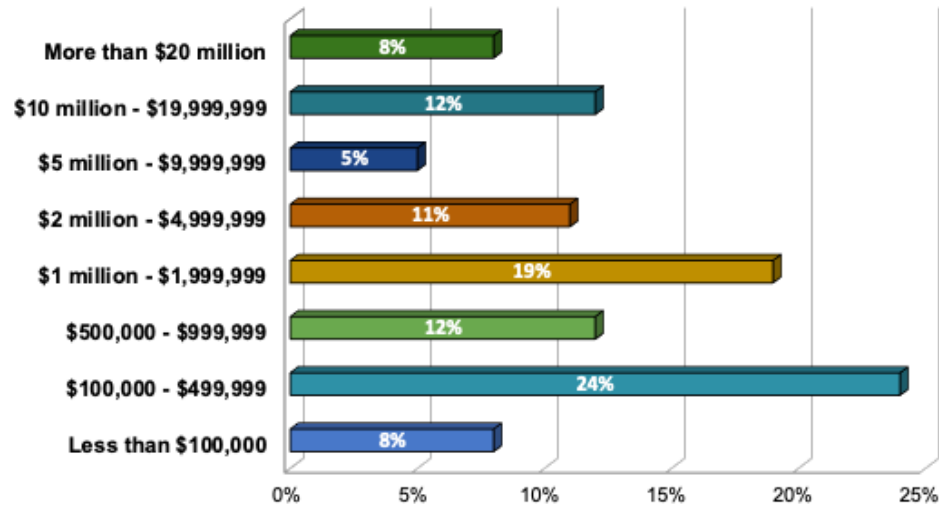


**C: Consulting**  
**F: Fellowship**  
**D: Discovery**  
**I: Institute**

# MEET OUR CLIENTS

RAIN for the Sahel and Sahara **C**  
 Rockingham Nutrition and Meals on Wheels **C**  
 Roxbury-Dorchester Power in Community **C, F**  
 Safe Roads Alliance **C**  
 Safety For NonProfits **C**  
 SCS Noonan Scholars **C**  
 Seacoast Village Project **C**  
 Seeding Labs **C**  
 Social Capital Inc **C**  
 Southeastern New Hampshire Alcohol & Drug Abuse Services **C**  
 Southwest Boston CDC **C**  
 St. Katharine Drexel Parish **C**  
 Stacy Malone of the Victim Rights Law Center **C**  
 Steps to Success **C**  
 Strong Women, Strong Girls **C**  
 Suzuki School of Newton **C**  
 The Boston Home **C**  
 The Furniture Trust **C**  
 The Lawrence and Lillian Solomon Foundation **C**  
 The Lenny Zakim Fund **F**  
 The Rotch Jones-Duff House & Garden Museum **C**  
 The Youth Council **C**  
 Transformative Culture Project **C**  
 Triangle, Inc. **C**

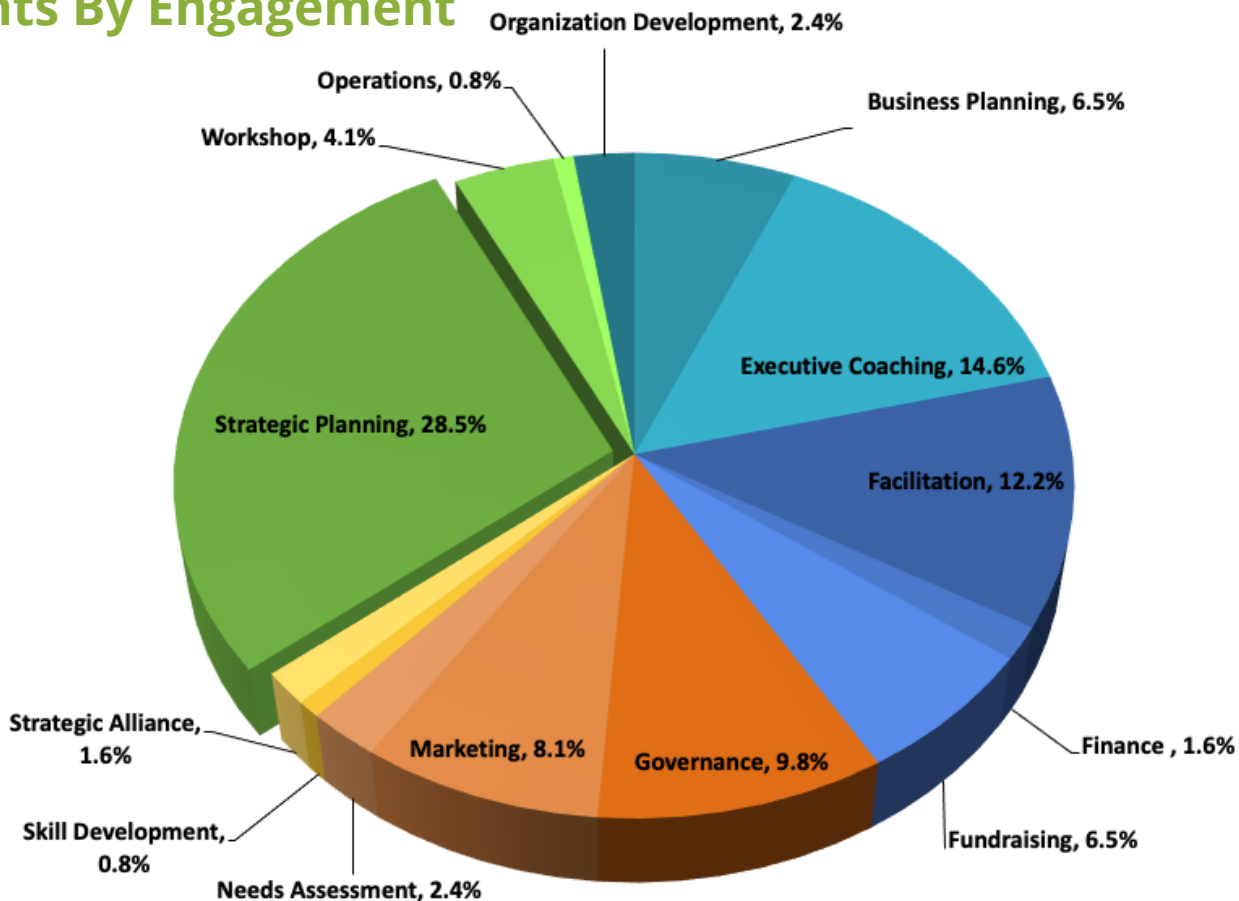
## Clients By Budget



Union Square Main Streets **C**  
 Urban College of Boston **C**  
 UWander **C**  
 Victory Programs, Inc. **C**  
 Waban Improvement Society **C**  
 Worcester Art Museum **C**  
 Yankee Onsite Wastewater Association **C**  
 York Public Library **C**

**C: Consulting**  
**F: Fellowship**  
**D: Discovery**  
**I: Institute**

## Clients By Engagement





## CLIENT SPOTLIGHTS

### *St. Katharine Drexel Parish*

St. Katharine Drexel (SKD) Parish is a Black Roman Catholic Community located in the center of Boston. The Parish was looking to develop a strategic plan that would enable them to continue as a dynamic presence in the community and ensure their growth and viability. The consultants from ESC conducted interviews with stakeholders to learn what the SKD community looks like and how they think about their Parish home. A SWOT analysis was used to help identify four key goals to achieve future growth and viability: grow the Congregation by 5% per year over next five years; increase children/youth participation; strengthen relationships within SKD community and external partners; and promote financial independence.



Toni Leone and Lisa Hall,  
Archdiocesan Black Catholic Choir

“The team of ESC consultants were knowledgeable and easy to work with. They set goals for the process and engaged the whole parish in the strategic plan which led to real buy in. We’ve already begun to implement a number of identified action items and are actually ahead of schedule on our timeline.”

**-Robert J. Credle, chairperson of the ad hoc strategic planning committee**

### *NH Peace Action*



NH Peace Action

NH Peace Action, a nonprofit dedicated to making a contribution to world peace, engaged ESC to help address their declining and aging membership and future funding. They created a strategic planning committee comprised of several Board Members and the Executive Director along with three ESC consultants. Based on the data gathered by the consultants in an environmental analysis, the committee produced the core strategic planning components: mission, vision, SWOT, top issues, and prioritized goals, strategies, and actions. This resulted in a set of priorities to move the organization forward including a diversified fundraising plan; a messaging guide that targets key audiences; new

membership options; development of thought leadership materials; formation of strategic alliances; and improved brand identity.

# ESC CONSULTING

Nonprofits facing a significant opportunity or challenge choose ESC Consulting to provide unparalleled affordable guidance. Our expertise spans board development, strategic planning and implementation, marketing, board governance, fundraising programs including campaign feasibility, meeting and retreat facilitation, leadership coaching and more. From a nonprofit needing assistance building an effective board to a school system strengthening their community engagement programs, ESC develops strategic and tactical solutions appropriate to the unique circumstances of each client.

## \*Former Position

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Parker Island Growth Strategy  
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Center for Orthopedics, Spine and Sports Medicine, South Shore Health

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Grossman Companies Inc.

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*Vice President of Intellectual Property\**  
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**\*Former Position**

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**Jerald Johnson**

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**Bruce Margolis, Ph.D.**

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Medical School

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*Chairman\**  
Mihaly International Corp.

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*Superintendent\**  
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Shire Human Genetic Therapies

**William Mrachek**

*Vice President of Human Resources\**  
Anika Therapeutics

**Pamela Musk**

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*Strategy Consultant\**  
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**Irwin Nesoff**

*Associate Professor and Chair  
Department of Leadership and  
Policy\**  
Wheelock College

**Marion Nierintz**

*Former Director of Development,  
Marketing and Public Relations*  
Bay Cove Human Services

**Barry Nolan**

*Senior Advisor\**  
Congressional Staff of Rep.  
Carolyn Maloney (NY-12)

**Sue Ogle**

*President*  
OGLE Training and Consulting

**Andrew Oram**

*Owner*  
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**Jacques Ouimet**

*Vice President of Networks and  
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*Chief Operating Officer\**  
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*Vice President, Human Resources\**  
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Associates, Atrius Health

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Cosenta, LLC

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*Sr. Associate Director of Admissions*  
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**Mary Tafuri Ross**

*Director\**  
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**Ronald Ryan**

*Vice President and Chief Financial  
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Haemonetics Corporation

**Karen Saltiel**

*Chief Human Resources Officer and  
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The Primerica Foundation  
Primerica

**Robert Samoluk**

*Director Human Resources Finance  
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**Frank Schneider**

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**\*Former Position**



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International Filing Company

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Ethics Office, State Street Bank

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Kronos, Inc.

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*President/CEO*  
The SC Group

**C. Jeffrey Smith**

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**Sam Solomon**

*Principal*  
Solomon Associates

**Michael Stauff**

*Senior Vice President & Chief Financial Officer\**  
TranSwitch Corporation

**Marilyn Stempler**

*Partner\**  
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**George Swope**

*Interim Head of School\**  
Covenant Preparatory School

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*President and CEO\**  
Venus Wafers, Inc.

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*Director of Media Relations\**  
Saint Anselm College

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*President and Founder*  
Catalyst Consulting Group

**Daniel Waintroob**

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Strategic Potential, LLC.

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*Managing Account Director\**  
Acxiom Corporation

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*SVP and Relationship Manager*  
Boston Private

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*Vice President of External Affairs\**  
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**Rachel Winkeller**

*Director of Strategic Management\**  
U.S. Department of Transportation  
Volpe National Transportation Systems Center

**John Woodard**

*Of Counsel\**  
Dane & Howe LLP

**Debra Yanofsky**

*Marketing Consultant\**  
Fidelity Investments

**Michael Zerigian**

*Supply Chain Consultant\**  
MMZ Supply Chain Consulting

**Mark Zuroff**

*President\**  
CFO Consulting Group

**\*Former Position**



"We were paired with an exceptional team of consultants and to say we miss having them part of the USMS family already is no understatement. The skill, experience, and professionalism the team brought to our strategic planning enabled us to craft a plan that I truly believe will carry us into our next chapter with purpose and focus that will enable us to build a foundation for decades of service to come."

— **JESSICA L. ESHLEMAN**

*Executive Director, Union Square Main Streets*

# ESC FELLOWSHIPS

ESC Encore Fellowships provides transitional management support by matching experienced, accomplished professionals with nonprofit organizations in high impact, paid leadership engagements.

ESC Fellows help build capacity in areas such as management, operations, marketing, fundraising, human resources, finance, business development, and program development.

**Jennifer Bonardi**

*Grant Writer*  
Roxbury-Dorchester Power in  
Community (Episcopal Diocese  
of Massachusetts)

**Myran Parker-Brass**

*Interim Executive Director*  
Massachusetts Veterinary  
Medical Association

**Rita Cramer**

*Project Manager*  
New Garden Park, Inc.

**Gordon Cromwell**

*Director of Strategic Finance and  
Operations*  
Empower Schools

**Janice Dolnick**

*Marketing and Communications Fellow*  
Generations Incorporated

**Jeffrey Ghannam**

*Project Manager Software Consultant*  
Kripalu Center for Yoga & Health

**Jennifer Goudreau**

*Intergenerational (IG) Strategy Fellow*  
Jumpstart for Young Children

**Stella Lee**

*Strategic Plan Project Manager*  
Aspire Living & Learning

**Robert Malley**

*Art Connection-RI*  
Interim Development Manager

**Michael Phelan**

Massachusetts Council on Gaming  
and Health  
*Development Director*  
Art Connection-RI  
*Interim Program Manager*

**Susan Stendahl**

The Lenny Zakim Fund  
*Fundraising & Communication Fellow*



Generations Incorporated

“

"As our organization goes through a name change and rebranding process, we feel incredibly fortunate to have an ESC Fellow supporting this important work. Our Fellow brings a depth of experience and expertise that is unmatched for our financial investment. It has also been impressive to see how invested our Fellow has become in our organization and work. For a defined project scope and timeline, I can't recommend the ESC Fellows program highly enough."

— **WES ENICKS**

*Executive Director, Generations Incorporated*

# ESC INSTITUTE

From one-on-one coaching to professional development courses, ESC Institute provides a variety of programs to help build the nonprofit leaders of tomorrow. Our experienced consultants share best practices and real-world experiences to help organizations address the challenges they face in these uncertain times.

Now in its fifth year, the Nonprofit Executive RoundTable (NET) provides a confidential forum where executive directors and CEOs can share challenges and get feedback from other leaders who understand the unique challenges of running a nonprofit. This cohort-based program provides a life-line to executives as they lead through the ever-changing environment.



“

“NET has been an invaluable resource to me, so much so that I’ve been a member of the same cohort for three years now. Every month, I talk to my executive director colleagues and learn something new, have an empathetic group of professionals who understand the challenges of being an ED, and come away with additional resources and ideas to implement in my own organization. I would not be the ED I am today without the support of ESC’s Nonprofit Executive RoundTable.”

— **SHOMA HAQUE**  
*Executive Director, Steps To Success*

## ESC DISCOVERY



ESC Discovery grew out of a strong belief that the second half of life is full of possibilities. For the past five years, the program has provided tools and resources to help older adults explore how to turn prior work or volunteer experience into social impact in the encore stage of life. After the launch of the Discovery Centers in 2018, the program continued to run at five Councils on Aging in eastern Massachusetts. The Centers provided peer coaching to help “younger” older adults (age 55+) engage with nonprofits, government agencies and other organizations in an effort to apply their skills and experience in social purpose work.

As a result of the pandemic, ESC felt it necessary to focus on our core competencies. The difficult decision was made to no longer offer the ESC Discovery program. The Discovery Centers are looking for a new home and are continuing to be funded, in part, through the Massachusetts Council on Aging.



# CONTRIBUTORS

It is with sincere gratitude that we thank all those who generously contributed to help us further our mission of enabling nonprofits to meet the needs of the communities they serve. The contributions below reflect fiscal year 2020.

## **Benefactor (\$5,000+)**

Bonnie Clendenning

## **Partner (\$2,500-\$4,999)**

Sandy Batchelder

Doug Dickson

Patricia Hurley

Imran Khalid-Kahn

Linda Vacovec

## **Sustainer (\$1,000-\$2,499)**

Craig Anderson

Ed Collins

John & Marie Dacey

Gabe d'Annunzio

Mariana (Molly) Downer

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Michael F. Stauff

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John Woodard

Debra Yanofsky

## **Friend (\$1-\$249)**

Christine Abrams

Joel Adler

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Rita & Charles Alesi

Judith Allen Ferretti

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Marjorie Bauer

Bruce Berzin

Gregory Betley

Louise Borke

Elizabeth Boyles

Ralph Brown

Harold Burns

Michael Byrnes

Regina Caines

Nancy Carlin

Susan Chandler

Jaidev Dasgupta

Barbara Estabrook

William Flynn

Sarah Freeman

David Guydan

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Annette Rubin

Jean Scarrow

C. Jeffrey Smith

Marilyn Stempler

Pamela Swain

## **Foundations/Corporations**

Barr Foundation

The Boston Foundation

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## **Contributors of Goods & Services**

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Marion Nierintz

Michael F. Stauff

Robert A. Lawrence

Thomas D. Bushman

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Anonymous (2)

# FINANCIAL OVERVIEW

October 1, 2019 through September 30, 2020

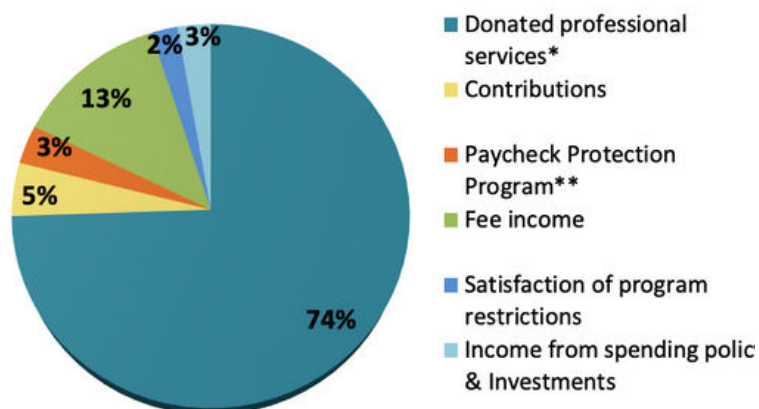
Unrestricted Revenue and Support	2020	2019
Donated professional services*	\$ 1,943,428	\$ 2,514,855
Contributions	\$117,222	\$77,976
Paycheck Protection Program	\$85,300	
Fee income	\$333,407	\$492,436
Satisfaction of program restrictions	\$57,846	\$45,964
Income from spending policy & Investments	\$72,659	\$73,247
<b>Total unrestricted revenues and support</b>	<b>\$2,609,862</b>	<b>\$3,204,478</b>
<b>Total (minus donated professional services)</b>	<b>\$666,434</b>	<b>\$689,623</b>

Expenses	2020	2019
Program services	2,469,086	3,079,561
Management and general	99,275	111,142
Fundraising	46,277	45,447
<b>Total Expenses</b>	<b>2,614,638</b>	<b>3,236,150</b>
<b>Total (minus donated professional services)</b>	<b>(4,776)</b>	<b>(31,672)</b>

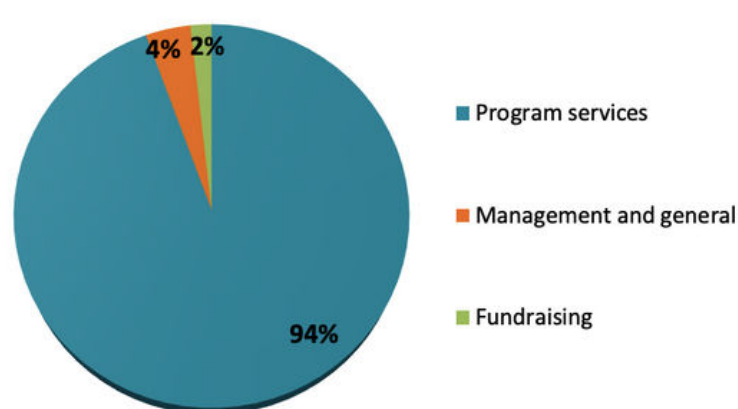
Change in net assets	2020	2019
Change in unrestricted net assets	(4,776)	(31,672)
Change in net assets with donor restrictions	66,186	(3,749)
<b>Total change in net assets</b>	<b>61,410</b>	<b>(35,421)</b>

Net assets, beginning of year	1,828,284	1,863,705
Net assets, end of year	<b>\$ 1,889,694</b>	<b>\$ 1,828,284</b>

## FY2020 Unrestricted Revenue & Support



## FY2020 Expenses



\*Donated Professional Services represents volunteer consultant hours, valued at a rate of \$175 per hour