ESC of New England

ESC of New England (Executive Service Corps) is a regional nonprofit corporation dedicated to improving the quality of life in the communities we serve throughout Eastern Massachusetts and Rhode Island, by providing high-quality, affordable consulting services, resources, and mentors to nonprofits and education leaders seeking to address critical organizational issues. We accomplish these goals by drawing upon an extensive volunteer network of senior-level executives and professionals who are committed to helping public service organizations more effectively serve their constituents.

Mission

ESC’s mission is to enhance the overall impact of the nonprofit community by enabling organizations to operate more effectively to meet the needs of their constituencies.

Consulting Services

ESC provides affordable high-quality consulting services in:

- Governance
- Strategic Management
  - Strategic Planning
  - Contingency Planning & Strategic Opportunities
- Business Operations
  - Business Planning
  - Financial Management
  - Program Evaluation
  - Human Resources Management
- Outcomes Measurement
- Marketing & Branding
- Fundraising
- Executive Coaching
- Facilitation
Workshops

ESC provides over thirty different workshops that are designed and presented by our consultants. Workshops are interactive, full of user-friendly information, tools, templates and great opportunities for participants to network and initiate collaborative relationships.

Topic Areas

■ Outcomes Measurement
■ Organization Development and Human Resources
■ Marketing and Fundraising
■ Board, Volunteer and Donor Engagement
■ Strategic Management and Planning
■ Skills Development

Complimentary Assessment

ESC offers a complimentary ninety-minute assessment visit with experienced ESC consultants who will work with an organization to determine its key issues and needs and offer advice on how to address them. The assessment visit comes at no charge and with no obligation. To arrange a complimentary assessment visit, please submit a request for Assistance on our website at www.escne.org or call Director of Consulting Ulea Lago at 617-357-5550.

Staff

Bethany Kendall, President & CEO
Ulea Lago, Director of Consulting
Kyle Dacuyan, Manager of Recruitment & Development
Maren Reisch, Assistant to the President
Allison Pickering, Consulting Services Coordinator
Donna Morelle, Director of Encore Fellowships
David Guydan, Director of DWN Programs
ESC Facts and Statistics

Clients by Sector Area

Clients by Project Type

Clients by Budget Size

More than 1,500 nonprofit leaders attended ESC workshops in 2013.
Message from the President

Dear Friends,

Positive impact in our community has always been at the core of ESC’s mission and service. It is interesting that prospective volunteer consultants almost always identify this as a primary reason for their interest in the organization. And knowing the difference that they make is why 85% are still volunteering with ESC five years later. Helping organizations more effectively benefit the community is what ESC is about—whether it is through consulting services, professional development, or executive coaching. In the last year, we have been working on even more programs that will meet this goal.

ESC has recently been selected to become the regional operator for the national Encore Fellowship Program after an extensive vetting process by Encore.org. ESC will match skilled, experienced professionals as Fellows with social-purpose organizations in high-impact, long-term assignments. This is a new resource of talent to help increase the operational capacity of nonprofits in Massachusetts, with future potential to bring the program to Rhode Island. And it represents a tremendous opportunity to those “pursuing a second act for the greater good”. Fellows will complete 1000 hours of service to a single nonprofit within a year, receive a stipend, and participate in ongoing professional development and networking with the nonprofit community.

ESC’s regional initiation of the program comes at a time of both great need from nonprofits—and great interest on the part of boomer generation adults in this line of work. A recent survey by Encore.org and the MetLife Foundation, for example, found that 31 million Americans between the ages of 44 and 70 were interested in transitioning into some type of social purpose work after leaving their primary careers.

Just as community impact has been central to our mission, this level of professional experience has been a central value of ESC’s since its inception. Executive Service Corps of New England began nearly 32 years ago through the efforts of the late Caleb Loring, Jr., former Managing Director at Fidelity and the late Ezra Merrill, the former Chairman of HP Hood, who believed it would be mutually valuable to share the knowledge and expertise that retiring executives had gained in their careers with nonprofit organizations serving the community. Because of this, ESC has always been involved in redefining the post-primary career period—a broader movement captured today with the term “encore.”

Although the encore language wasn’t there in the early days of our organization, the spirit certainly was—and continues to endure.

Bethany B. Kendall
President & CEO

In Memoriam

Caleb Loring, Jr.
1921-2013
Founder, Benefactor and Lifetime Honorary Chair of the Board
Executive Service Corps of New England

With deepest gratitude for inspirational leadership and exemplary commitment to the nonprofit community.
Clients

ADDP
AFC Mentoring
Agassiz Baldwin Community
Asian American Civic Association
Aspergers Association of New England
BELL
Belmont Media Center
Bessie Tartt Wilson Initiative For Children
Boston By Foot
Boston Collegiate Charter School
Boston Jewish Film Festival
Boston Partners in Education
Boys & Girls Club of Boston
Brookview House
Cambridge at Home
Capital Good Fund
Centering Healthcare
Codman Square NDC
Community Work Services
Congregational Church of Needham
Dagbe
Discovering What’s Next
Dream Far High School Marathon
Dress for Success
Ellis Memorial
Empower Dalit Women of Nepal
English for New Bostonians
Fenway High School
First Literacy
Friends of Mel
FriendshipWorks
Gilbert Albert Community Center
Greater Boston Manufacturing Partnership
Harbor Arts
Health Quarters
Higher Ground
Holliston Cable Access Television
House of Possibilities
Household Goods Recycling of Massachusetts
International Institute
Jane Doe
Journeys of Hope
Just-a-Start
MA Down Syndrome Congress
MA State Science Fair
MACDC
Make A Wish
Margaret Fuller Neighborhood House
May Institute
MA Council on Economic Equality
MA Office of Public Collaboration
Mujeres Unidas Avanzando
National Braille Press
National Organization for Rare Disorders
New England Center for Investigative Reporting
The New School of Music
NewTV
Northeast Arc
Paine Senior Services
Peabody Cable Access
Press Pass
Puppet Showplace Theatre
Quincy Asian Resources, Inc.
Salem Theatre (Salem Arts Center)
Scandinavian Charitable Society
Schwartz Center (Cerebral Palsy Council of Greater New Bedford Inc.)
Seeding Labs
Tenacity
The Sharing Foundation
Urban Edge Housing
Watertown Village
Web of Benefit
Wellesley Natural Resources Commission
Westerly Library
Consultants

Ruth Aaron
Healthcare Nonprofit Executive
Specialist*

Robert C. Adams
National Fire Protection Association
Vice President

Judith Allen
The Education Resources Institute (TERI)
National Programs Consultant

David Ames
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Priest-in-Charge*

Sheila Ardery
Jewish Community Housing for the Elderly
VP for Operations and Administration

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Richard Balzer & Associates, Inc.
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Daniel Fritz
nSight, Inc.
Vice President

*current position
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Temple Israel of Natick
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Managing Director & Executive Vice President

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Assoc. Dean for Student Life and Activities

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Director & Senior Credit Officer

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The Stride Rite Retail Corporation
President

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DaimlerChrysler
Vice President—MMC Global Alliance Project

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David A. Kourtz
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VP of Sales, General Business Services

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Year 2000 Program Manager

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Executive Vice President

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Emergent Technologies Corp
Consultant*

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Cornelia de Lange Syndrome Foundation
Executive Director

Bruce Margolis, Ph.D.
TXJ Companies, Inc.
Executive Vice President, CHRO

Ellen Meisels
Ethical Rounds, Harvard China Social Development Forum
Legal & Public Health Professional

Eugene B. Mihaly, Ph.D.
Mihaly International Corp
Chairman*

*current position
# Consultants

<table>
<thead>
<tr>
<th>Name</th>
<th>Position and Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Michael Milczarek</td>
<td>May Institute, Inc. Treasurer &amp; CFO</td>
</tr>
<tr>
<td>Stephen Mills</td>
<td>Reed Business Information Director of Analytics</td>
</tr>
<tr>
<td>Alyson Molloy Hussey</td>
<td>AFC Mentoring Director of Development*</td>
</tr>
<tr>
<td>Susan Moloney</td>
<td>Fidelity Investments Group Director, Brokerage Marketing</td>
</tr>
<tr>
<td>Lynn S. Moran</td>
<td>Associate Strategies Executive Search Consultant*</td>
</tr>
<tr>
<td>Donna Morelle</td>
<td>Cumberland Public Schools Superintendent</td>
</tr>
<tr>
<td>Marianne Mortara</td>
<td>Shire Human Genetic Therapies Talent Management Director</td>
</tr>
<tr>
<td>Barbara Mount</td>
<td>Nationwide Insurance Medical Specialist</td>
</tr>
<tr>
<td>Michael Nacey</td>
<td>Bolt, Beranek and Newman, Inc. Vice President, Human Resources Administration</td>
</tr>
<tr>
<td>Irwin Nesoff</td>
<td>Wheelock College Associate Professor of Social Work; Coordinator, Graduate Prog. in Organizational Leadership*</td>
</tr>
<tr>
<td>R. Bradford Newman, Jr.</td>
<td>Jordan’s Furniture Manager of Learning &amp; Organizational Development</td>
</tr>
<tr>
<td>Marion Nierintz</td>
<td>Nonprofit Management Consultant</td>
</tr>
<tr>
<td>Susan Ogle</td>
<td>OGLE Training &amp; Consulting President*</td>
</tr>
<tr>
<td>Judith Opert Sandler</td>
<td>Education Development Center, Inc. Vice President, Senior Policy Advisor*</td>
</tr>
<tr>
<td>Anthony O’Reilly</td>
<td>Pricewaterhouse Coopers National Quality Leader, Internal Audit Division</td>
</tr>
<tr>
<td>Laura Pedone</td>
<td>Senior Whole Health (SWH) Director of Network Development &amp; Provider Relations</td>
</tr>
<tr>
<td>William M. Polk</td>
<td>Groton School Headmaster, Teacher of Religion</td>
</tr>
<tr>
<td>John Richards</td>
<td>Oneoheight Apparel Limited Interim CFO*</td>
</tr>
<tr>
<td>Deborah A. Robbins</td>
<td>State Street Corporation Vice President &amp; Product Manager</td>
</tr>
<tr>
<td>Miles Robinson</td>
<td>Consenta, LLC Principal &amp; Founder</td>
</tr>
<tr>
<td>Ellsworth “Al” E. Rosen</td>
<td>American Friends of Hebrew University New England Director</td>
</tr>
<tr>
<td>Ronald J. Ryan</td>
<td>Haemonetics Corporation Vice President &amp; CFO</td>
</tr>
<tr>
<td>Robert D. Sadler</td>
<td>Hart, Inc. President</td>
</tr>
<tr>
<td>Julie Salganik</td>
<td>Vantage Partners, LLC Senior Advisor*</td>
</tr>
<tr>
<td>Toby Seggerman</td>
<td>Old Mutual Global Index Trackers VP of Business Development</td>
</tr>
<tr>
<td>Robert D. Seiler</td>
<td>International Filing Company Vice President of Marketing and Business Development</td>
</tr>
<tr>
<td>Barry J. Seltser, Ph.D.</td>
<td>GAO Center for Design, Methods, and Analysis Director</td>
</tr>
<tr>
<td>Sylvia Q. Simmons, Ph.D.</td>
<td>American Student Assistance Corporation President</td>
</tr>
<tr>
<td>Andrew Staniar</td>
<td>A.D. Staniar &amp; Associates Managing Director</td>
</tr>
<tr>
<td>Michael F. Stauff</td>
<td>TranSwitch Corporation SVP, Chief Financial Officer</td>
</tr>
<tr>
<td>Alan Steinert, Jr.</td>
<td>Business/Management Consultant*</td>
</tr>
<tr>
<td>Marilyn Stempler</td>
<td>Brown Rudnick, LLP Partner</td>
</tr>
<tr>
<td>Pamela Swain</td>
<td>NE Historic Genealogical Society Deputy Director</td>
</tr>
<tr>
<td>Camay Tan</td>
<td>YMCA of Malden CFO*</td>
</tr>
<tr>
<td>Elisabetta Vitali</td>
<td>F2i – Fund for Italian Infrastructure Partner</td>
</tr>
<tr>
<td>Ruth Weber</td>
<td>Young Audiences of Massachusetts Executive Director</td>
</tr>
<tr>
<td>Matt Weiner</td>
<td>Management Consultant &amp; Entrepreneurial Coach</td>
</tr>
<tr>
<td>Ingrid Joy Wolfson</td>
<td>The Wolfson Group Executive Coach</td>
</tr>
<tr>
<td>John V. Woodard</td>
<td>Dane &amp; Howe, LLP Of Counsel</td>
</tr>
<tr>
<td>Andrew Wrobel</td>
<td>Fidelity Investments Senior VP</td>
</tr>
<tr>
<td>Debra Yanofsky</td>
<td>Fidelity Investments Marketing Consultant</td>
</tr>
<tr>
<td>Hungwha Yu, D.B.A.</td>
<td>Lesley University Assistant Dean &amp; Director of National Programs Operations</td>
</tr>
</tbody>
</table>

*current position

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In Memoriam
Edward Stevens
# Financial Overview

For the years ending September 30, 2013 and 2012

## Unrestricted Revenues and Support:

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donated professional services*</td>
<td>$2,390,518</td>
<td>$2,383,850</td>
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<tr>
<td>Contributions</td>
<td>154,129</td>
<td>272,170**</td>
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<tr>
<td>Fee income</td>
<td>265,477</td>
<td>208,982</td>
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<tr>
<td>Satisfaction of program restrictions</td>
<td>146,331</td>
<td>162,396</td>
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<tr>
<td><strong>Total unrestricted revenues and support</strong></td>
<td>2,956,455</td>
<td>3,027,398</td>
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</tbody>
</table>

## Expenses:

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
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</thead>
<tbody>
<tr>
<td>Program services</td>
<td>2,675,362</td>
<td>2,681,388</td>
</tr>
<tr>
<td>Management and general</td>
<td>199,504</td>
<td>271,281</td>
</tr>
<tr>
<td>Fundraising</td>
<td>62,183</td>
<td>62,943</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td>2,937,049</td>
<td>3,015,612</td>
</tr>
<tr>
<td><strong>Changes in unrestricted net assets from operations</strong></td>
<td>19,406</td>
<td>11,786</td>
</tr>
</tbody>
</table>

## Other unrestricted revenues (expenses):

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
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</thead>
<tbody>
<tr>
<td>Investment income</td>
<td>11,329</td>
<td>10,939</td>
</tr>
<tr>
<td>Net realized and unrealized gains (losses) from trusts and investments</td>
<td>408</td>
<td>24,203</td>
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<tr>
<td><strong>Total other unrestricted revenues (expenses)</strong></td>
<td>11,737</td>
<td>35,142</td>
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<tr>
<td>Change in unrestricted net assets</td>
<td>31,143</td>
<td>46,928</td>
</tr>
<tr>
<td>Change in temporarily restricted net assets</td>
<td>130,872</td>
<td>33,579</td>
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<tr>
<td>Change in permanently restricted net assets</td>
<td>1,106</td>
<td>644</td>
</tr>
<tr>
<td><strong>Total change in net assets</strong></td>
<td>163,121</td>
<td>81,151</td>
</tr>
<tr>
<td><strong>NET ASSETS, beginning of year</strong></td>
<td>969,273</td>
<td>888,122</td>
</tr>
<tr>
<td><strong>NET ASSETS, end of year</strong></td>
<td>$1,132,394</td>
<td>$969,273</td>
</tr>
</tbody>
</table>

*Donated Professional Services represents volunteer consultant hours, valued at a rate of $175 per hour in FY 2013 and FY 2012.

**Includes special fund in honor of the 30th Anniversary.
The market value of the endowment is $583,362 as of September 30, 2013.
Complete audited financial statements are available on request.
# Contributors

## Individuals

### Major Benefactor  $5,000 and above

- Anonymous
- Mrs. John B. Gray
- Caleb Loring, Jr.
- Hungwah Yu, D.B.A. & David Elliot

### Community Donor  $2,500 to $4,999

- Albert Gold
- Robin D. Kelley
- Michael Stauff
- Alan Steinert, Jr.

### Sustainer  $1,000 to $2,499

<p>| | |</p>
<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Joel Aronson</td>
<td>Barbara A. Michaelsen</td>
</tr>
<tr>
<td>Judith Allen</td>
<td>Marion L. Nierintz</td>
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<tr>
<td>Samuel L. Batchelder, Jr.</td>
<td>Miles Robinson</td>
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<td>Donna Davis</td>
<td>Robert D. Sadler</td>
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<tr>
<td>Robert French</td>
<td>Robert Schneider</td>
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<tr>
<td>George H. Hanford</td>
<td>Robert Shay</td>
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<tr>
<td>Patricia Hurley</td>
<td>Esther Shay</td>
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<tr>
<td>William R. Huss</td>
<td>Robert H. Traylor</td>
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<tr>
<td>Robert A. Lawrence</td>
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</tbody>
</table>

### Sponsor  $500 to $999

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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Michael Byrnes</td>
<td>Jon Lupfer &amp; Susan Berseth</td>
</tr>
<tr>
<td>Edmund &amp; Elizabeth Cabot</td>
<td>Eugene B. Mihaly</td>
</tr>
<tr>
<td>Mariana (Molly) Downer</td>
<td>Elizabeth F. Potter</td>
</tr>
<tr>
<td>Theresa A. Hamacher</td>
<td>Deborah A. Robbins</td>
</tr>
<tr>
<td>Donald L. Hodgman</td>
<td>Ron Ryan</td>
</tr>
<tr>
<td>John Knutson</td>
<td>William C. Schrader</td>
</tr>
<tr>
<td>Eli Lipcon</td>
<td></td>
</tr>
</tbody>
</table>
Contributors

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William Carruth
Bonnie Clendenning
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Gabe d’Annunzio
Barnet Fain
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Philip Greenough
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Bethany B. Kendall
J. Richard Klein

Nancy Korman
Gabriele Loebbert
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Samuel Plimpton
Dean E. Ridlon
Ellsworth E. Rosen
Robert Seiler
Edward Sternick
Miriam Vializ-Briggs
Neil Wallace
Debra Yanofsky

Contributor to $249

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Daniel C. Burnes
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Joseph Colbert
John G. Cook
Joel Corman
Robert Dempsey
Kenneth Elgart
Robert R. Forsberg
Stuart J. Hamill
Robert M. Keller
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Rory Laughna
Leonard Lentz
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Marianne Mortara
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Ruth Nemzoff
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William M. Polk
Gail Roberts
Gilbert M. Roddy, Jr.

Jack C. Smith
Jerry M. Socol
Phillip Stone
Ralph E. Stuart, Jr.
Pamela Swain
Robert Zinman

October 1, 2012 - September 30, 2013
Contributors

Foundations / Corporations

The John W. Alden Trust
Amica Companies Foundation
BNY Mellon Charitable Giving Program
The Boston Foundation, Vision Fund
Bristol County Savings Charitable Foundation
Cambridge Community Foundation
Citizens Bank Foundation
Eastern Bank Charitable Foundation
Deborah Munroe Noonan Memorial Fund,
Bank of America, N.A., Trustee

Procter & Gamble Corporate Giving Fund
The Providence Plan
The Rhode Island Foundation
Rodman Ride for Kids
The Charles Sanders Trust
The Clinton H. & Wilma T. Shattuck Charitable Trust
State Street Foundation, Inc.
The Nathaniel & Elizabeth P. Stevens Foundation
Tufts Health Plan Foundation

Contributors of Goods and Services

Alexander, Aronson & Finning & Co.
Allen and Gerritsen
Ropes & Gray, LLP

K&L Gates
Brown Rudnick

Members of the Ezra Merrill Legacy Society • Gifts to Endowment

Dr. J. Scott Abercrombie, Jr.
Thomas D. Bushman
Donna Davis
Bruce Enders
Judith Allen Ferretti
Dozier Gardner
Albert Gold
John B. Gray
Bruce Harriman
Bayard Henry
Eloise W. Hodges
Emily Hood

William R. Huss
Robert A. Lawrence
Caleb Loring, Jr.
Ellen W. & Hugh F. MacColl
Dorothy & Edmund Marshall
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Nelson B. Robinson
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