ANNUAL REPORT

2019
LETTER FROM THE BOARD CHAIR AND PRESIDENT

Just as FY18 was a time of growth and change for ESC, the focus of 2019 was to provide the same high level of support and engagement we provide in Massachusetts to clients, consultants and fellows across the region. In FY19, ESC’s contracts grew 10%, serving 124 organizations; 55% of those clients had previously done business with ESC. Specifically:

- Our consulting business, led by Vice President Miles Robinson, Northern New England Director Lynn Post, and our first consulting fellow, Mary Tafuri Ross, set records for securing and managing the most projects ever in a single year. That is good news for nonprofits and public agencies dedicated to serving the public good.
- With its expanded staff, ESC Discovery broadened both its tools and offerings and its outreach footprint, reaching 650 people where they work and participants seeking volunteer opportunities through Discovery Centers at Councils on Aging.
- The fellowship program focused on ensuring the impact of our fellows endured beyond the assignment. In FY19, 50% of new fellowship matches came from referrals from clients and partners.

In addition, we embarked on a strategic planning initiative for ESC. Just as we encourage our clients to have a strategic plan, we need to ensure we have a clear path forward for ESC and that our services are aligning with our mission. We look forward to staying in touch with you about our progress.

And, as always – thank you! Our success is only possible because of you—our core supporters. We’d like to thank our nonprofit clients working on the front lines, our devoted and passionate consultants and fellows, our dedicated Board of Directors, and our generous and thoughtful donors, for your commitment to enhancing the impact of nonprofit organizations throughout New England.

With gratitude,

Bonnie Clendenning, Board Chair
Julie Crockford, President

BOARD OF DIRECTORS

<table>
<thead>
<tr>
<th>Name</th>
<th>Title and Company</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Chair, President and Trustee*, The School for Field Studies</td>
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<tr>
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<td>Secretary, Director, Consumer Product Management*, Santander Bank</td>
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<td>Board Chair, Encore Boston Network</td>
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<td>Maggie Ford</td>
<td>Principal*, Ford Consulting</td>
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<td>Neil H. Golden</td>
<td>Vice President*, ADE Corporation</td>
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<td>William R. Huss, Ph.D.</td>
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<td>Marolí Licardié</td>
<td>Executive Director, Family &amp; Children’s Service of Lynn</td>
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<tr>
<td>Linda Vacovec</td>
<td>Vice President of Health Promotion*, Plus One</td>
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*Last position held
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.

STAFF

Julie Crockford
President

Rachel Birkenthal*
Program and Talent Coordinator

Willia Cooper
Transition Navigator Coordinator
ESC Discovery

Katherine Cruise
Director of Communications

David Guydan
Director of ESC Discovery

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Cohort Manager, ESC Fellowships

Lynn Post
Director, Northern New England

Miles Robinson
Vice President

Mary Tafari Ross*
Outreach Manager

Christine Warren
Office Manager and Bookkeeper

Donna Morelle
Director of ESC Fellowships

INTERNS
Owen Lanphear*
Linyue (Roselyn) Zhong*

*Past staff member
ESC consultants donate their expertise, time, and talent to help nonprofits succeed.

This past year, across all programs, ESC worked with more than 100 nonprofit organizations. That is an increase of nearly 10% over FY18.

More than half of the nonprofit organizations that we work with are repeat customers.

From Boston to Concord, NH to Providence, RI to Lewiston, ME to Stockbridge, MA to Brattleboro, VT -- ESC serves nonprofits throughout New England.
WHO WE SERVE

ESC clients—nonprofits, schools or government agencies—range from start-ups to large organizations. Through four main programs, ESC helps nonprofits reach their full potential and maximize their impact in the community.

By Sector

Education 15%
- Arts, Culture & Historical 11%
- Health 14%
- Social Benefit 9%
- Community Development 7%
- Housing 6%
- Environmental 8%

WHO WE SERVE

15 - 40 Connection C
Access Framingham TV C, I
Addgene C
Amesbury Council on Aging D
Art Connection-RI F
Ausbon Sargent Land Preservation Trust C
BAMSI C
Beantown Jewish Gardens I
Black Heritage Trail of New Hampshire C
Boston Tax Help Coalition C
Boston Women’s Fund I
Bostonian Society I
Bridgton Historical Society C
Cambridge Art Association C
Camp Fire North Shore C
Camp Ramah in New England (CRNE) C
Campus Compact C
Centering Healthcare Institute F
Community Action, Inc. C
Community Systems, Inc. C
Congregation Beth Israel of the Merrimack Valley C
Crossroads Rhode Island F
Dartmouth Council on Aging D
Duxbury Council on Aging D
EcoTarium C
Elizabeth Stone House C
Emmanuel Music C
empowerHER C
Empower Success Corps F
EXPLO C
Facing History and Ourselves C
Family & Children's Service of Greater Lynn C, F, I
Family Continuity C
Family Nurturing Center C
First Congregational Church in Winchester C
First Parish of Norwell C
Foundation for MetroWest C
Framingham Council on Aging D
Framingham Public Schools C
GALA C
Generations Incorporated C
Gore Place Society C
Granada House C
Greater Four Corners Action Coalition C
Greater Medford VNCH I
Grimes-King Foundation for the Elderly C
Household Goods, Inc. F
Housing Families, Inc. C
Improbable Players C, I
In-Sight Photography Project C
Institute for Career Transitions I
Interise F
Invest in Girls I
Julie’s Family Learning Program C, F
Jumpstart for Young Children F
Kripalu Center for Yoga & Health F
Lawyers Concerned for Lawyers C, I
Little Brothers – Friends of the Elderly I
Living Independently Forever, Inc. C
Maine Association of Nonprofits C
Marblehead Festival of Arts C
Margaret Fuller House I
Mass Farmers Markets C
Mass Union of Public Housing Tenants C
Massachusetts Association of 766 Approved Private Schools (MAAPS) C
Massachusetts Association of Teachers of Speakers of Other Languages C, I
Massachusetts Council on Aging D
Massachusetts Public Health Association I
Maverick Landing Community Services C
METCO C
Mindfulness Program C
Misletoe Foundation C
Monadnock Buy Local C
More Than Words C
Mothers for Justice and Equality I
Multi-Service Eating Disorders Association, Inc. C
Museum of African American History F
National Bureau of Economic Research C
National Organization for Rare Disorders C
Neponset River Watershed Association C
New England Employee Benefits Council C
New England Library Association C
Narrows Wildlife Foundation C
North End Waterfront Health C
Open Table C
Partners in Health C

C = Consulting
F = Fellowship
D = Discovery
I = Institute
WHO WE SERVE

Patton Homestead & Archive C
People Helping People C
Physician Health Services, Inc. C
Piers Park Sailing Center I
Portsmouth Housing Authority C
RAIN for the Sahel and Sahara C
Rockingham Nutrition and Meals on Wheels C
Roger Williams Park Conservancy C
Roxbury Multi Service Center, Inc. I
Roxbury-Dorchester Mission Hub C
Safe Roads Alliance C
Seacoast Science Center C
Seeding Labs C
Slim Baker Foundation C
Somali Bantu Community Association C
Southwest Boston CDC C
St. Katharine Drexel Parish C
Steps to Success C, I
The Children’s Room I
The Furniture Trust C, I
The Guild C
The Institute of Professional Practice, Inc. F
The Lawrence and Lillian Solomon Foundation C
The Lenny Zakim Fund F
The Progeria Research Foundation I
The Youth Council C
Tutoring Plus of Cambridge C
Union Square Main Streets (USMS) C
Urban College of Boston C
Urban Farming Institute Boston I
UWander C
Victim Rights Law Center I
Wellesley Council on Aging D
White Horse Recovery C
Windham County Sheriff’s Office C
Worcester Art Museum C
Yankee Onsite Wastewater Association C

By Engagement Type

Succession 4%
Business Planning 8%
Executive Coaching 11%
Facilitation 10%
Finance 4%
Fundraising 4%
Governance 4%
Human Resources 3%
Marketing 13%
Other 5%
Strategic Planning 33%

ESC Consulting provided customized, collaborative, strategic support to more than 90 nonprofits throughout Massachusetts, Rhode Island, New Hampshire, Maine and Vermont. In FY19 clients ranged from a behavioral health center looking to expand its impact by increasing the number of clients they serve, to a nonprofit serving those with developmental disabilities wanting to develop a five-year strategic plan that would allow sustainable growth in the face of uncertain funding and service expectations. ESC’s work has impacted hundreds of thousands of people and we continue to be a resource to nonprofits facing both opportunities and challenges.

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Senior Psychologist and Principal  
Shapse & Associates

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Vice President*  
Ethics Office State Street Bank

Lionel Silberman  
Senior Architect  
Kronos, Inc.
"The talent, insight, and passion each [consultant] brought to our work is just flat out inspiring. The energy and experience consistently put forth are appreciated beyond words. Whether around a committee table or at an interview, the professionalism is lending so much to our work and to the credibility of the undertaking as a whole."

–Jessica Eshleman, Executive Director, Union Square Main Streets
client spotlights

IMPROBABLE PLAYERS

Improbable Players is a nonprofit organization that uses theater performance and workshops to address addiction, alcoholism, and the opioid epidemic. The organization reached out to ESC after the retirement of the founding executive director. The initial consulting engagement was to assess and revise the staffing structure of the organization. After several meetings, the ESC consultant identified additional areas for improvement that would assist with clarifying roles and responsibilities at Improbable Players. Working closely with staff, new finance and donor systems were designed.

"Taken together these new processes led to a large shift in roles and responsibilities. This shift in retrospect represented a small stroke of genius. Susan [Schiro, the ESC consultant] recognized that it would be impossible in her role to immediately parachute in, make some recommendations on new staff structure, and leave. Instead she got to know our work and our people and she nudged us over the course of six months towards efficiency and success," said Andy Short, Executive Director of Improbable Players. "Quite literally, Improbable Players was remade in that span of time."

Since working with ESC, Improbable Players has added five board members, recreated the executive director role, and hired its second executive director in 35 years. They were able to build out a pipeline, begin planning for its first fundraising gala, rework the entire budgeting process, and clarify staff roles. "The results speak for themselves. We have a board approved budget this fiscal year for the first time in a decade and our fundraising from individual donors this fiscal year has already doubled," said Short. In FY18-19, Improbable Players raised $29K and in 2019, the organization raised $61K at the gala alone.

GLOBAL AWARENESS
LOCAL ACTION (GALA)

Global Awareness Local Action (GALA) is a nonprofit working to strengthen the community by bringing people together to discover passions and cultivate skills that enrich rural lives and livelihoods. GALA is building a Community Makerspace and Vocation Hub in Wolfeboro, NH. It will provide equipment, tools and training organized in workshops such as woodworking, metal working, automotive, jewelry making, textiles, and ceramics. GALA will also focus on workforce development training to support both local job seekers and local businesses.

In 2017, GALA bought a 10,000 square foot building requiring major renovation as the future home of the GALA Makerspace. They turned to ESC for a feasibility study and a strategic business plan needed to provide a roadmap to realizing their vision. ESC researched regional makerspaces and partnerships with community colleges and local businesses to establish the feasibility. Then ESC and GALA worked together to document the market need, primary goals, programs and services, project dependencies, and detailed financial projections showing how to make this venture financially sustainable.

GALA’s Executive Director, Josh Arnold said, “Without this level of strategic planning, and in particular, the guidance from ESC, it would have been significantly more difficult to balance all the moving parts as successfully as we are now. We use the plan as our compass, relying on it to map out all the steps and resources we need, not only for the makerspace building renovations but also for operations during this major undertaking.”
ESC FELLOWSHIPS

ESC Encore Fellowships provide transitional management support from experienced professionals to move critical initiatives forward. ESC Fellows help build capacity for high-impact projects in areas such as management, operations, marketing, fundraising, human resources, finance, business development, and program development. Through a rigorous and selective matching process, ESC ensures that nonprofits are matched with a fellow that has the right skill set to meet the organization’s needs and create enduring impact.

Martha Bednarz
Development Manager
Interise

Leon Wilson
Director - Strategic Advisor Fellow
Museum of African American History

Charlene Allen
Talent Management Fellow
Interise

Jaidev Dasgupta
Database Consultant
Family & Children’s Service of Greater Lynn, Inc.

Mary Tarfuri Ross
Outreach Manager
Empower Success Corps

Leon Rozek
Facilities Manager
Household Goods, Inc.

Willia Cooper
Transition Navigator Coordinator, ESC Discovery
Empower Success Corps

Dorothy Fitzmaurice
Grants Manager
Julie’s Family Learning Program

Susan Stendahl
Development Associate
Julie’s Family Learning Program and Fundraising & Communication Fellow
The Lenny Zakim Fund

Ramesh Advani
Accounting Associate Fellow
Centering Healthcare Institute

Jennifer Goudreau
Intergenerational Strategy Fellow
Jumpstart for Young Children

Stella Lee
Strategic Plan Project Manager
The Institute of Professional Practice, Inc.

Robert Malley
Interim Development Manager
Art Connection-RI

William Nixon
IT Systems Engineer/Analyst
Kripalu Center for Yoga & Health

Kevin Riley
Process Improvement Fellow
Kripalu Center for Yoga & Health

Michael Phelan
Interim Program Manager
Art Connection-RI

"ESC developed terrific ideas on integrating physical space and systems which led CAI on the path to hire an ESC Encore Fellow. Greg is applying his extensive technology and systems background to streamline CAI’s client intake process. I’m thrilled to have someone like him at CAI."

– John Cuneo, CEO
Community Action, Inc. (CAI)
ESC INSTITUTE
Leadership training, mentoring and coaching

ESC Institute offers a variety of programs to help nonprofits build the leaders of tomorrow - from workshops on a range of topics, personalized leadership training, mentoring to coaching. Our experts share best practices and real-world experiences to help nonprofits address the challenges they face in these uncertain times.

A core program of ESC Institute is the Nonprofit Executive RoundTable (NET). Now in its fourth year, NET provides a confidential forum where chief executives can share challenges and get feedback from other leaders who understand the unique challenges of running a nonprofit. More than 40 nonprofit leaders have participated in the program and two groups have continued meeting since inception.

“It’s a great sounding board, a really good reality check for me on professional norms, and a terrific place for idea generation on all kinds of organizational and program material.” – Nonprofit Executive Roundtable Participant

ESC DISCOVERY
Changing how we think about what’s possible in the second half of life

ESC Discovery offers ideas, resources and a peer support system to help people explore how to turn prior work or volunteer experience into social impact in the encore stage of life.

Discovery programs address the issues that are unique to the “Encore Stage” of life — helping people reimagine what is possible in the second half of life in order to apply their time and talent to meet social needs locally in their communities or globally wherever the need may be.

In FY18, ESC launched a pilot program, ESC Discovery Centers, at five Councils on Aging (COA) in eastern Massachusetts. The program provides 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. The Centers provide additional resources such as a Discovery Toolkit which lists volunteer opportunities in their communities as well as seminars and eBooks. The program is continuing to evolve and expand into additional communities.
CONTRIBUTORS

It is with sincere gratitude that we thank all those who generously contributed to help us further our mission to empower nonprofits to meet the needs of the communities they serve. The contributions below reflect fiscal year 2019.

**Benefactor ($5,000+)**
Bonnie Clendenning

**Partner ($2,500-$4,999)**
Patricia Hurley
Linda Vacovec

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Doug Dickson
Mariana (Molly) Downer
David Ellis
Kenneth Fischer
Maggie Ford
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Gabriele Loebbert
Donna McGrath
Bruce Margolis
Marianne Mortara
Peter Olsberg
John Roll
Robert D. Seiler
Mark Streifer
John Woodard
Debra Yanofsky

**Friend ($1-$249)**
Anonymous
Christine Abrams
Francine Achbar
Ramesh Advani
Charles and Rita Alesi
Judith Allen Ferretti
David Ames
Claudia Bach
Sharon Bahn
James Barrow
Marjorie Bauer
Jeffrey Bayard
Gregory Betley
Louise Borke
Nancy Carlin
John and Ellen Carpenter
Hollis Chase
Julie Crockford
Martha Sloan Felch
Sarah Freeman
Ron Halpern
Stuart (Skip) Hamill
Kristy Hiller
Jerry Johnson
Marietta Joseph
Martha Karchere
Bob Keller
Judith Kidd
Kathy Kottaridis
David Kourtz
Ulea Lago
Claire Larabee
Rory Laughna
Maroli Licardie
Hugh MacColl
Rajiv Mallick
Michael Mazloff
Eugene (Gene) Mihaly
Robert Monahan
Skye Morrison
Carolyn Osteen
Brad Prenney
Jonathan Reuman
Miles Robinson
Gilbert Roddy
Tom Roose
Ellsworth (Al) Rosen
Susan Roughly
Annette Rubin
Jean Scarrow
Edward Selig
Robert Shay
Sylvia Simmons
Deborah Sinay
Marilyn Stepler
Pamela Swain
Chia Tan
Joan and Jack Wallwork

**Foundations/Corporations**
The Boston Foundation
Caleb Loring, Jr. and Rosemary M. Loring 1997
Charitable Lead Unitrust
Edmund & Betsy Cabot Charitable Foundation
Eastern Charitable Foundation
Eastern Bank Charitable Foundation
Forest Foundation
Massachusetts Association of Councils on Aging
State Street Foundation

**Contributors of Goods & Services**
Edelstein & Company
First Republic Bank
GMA Foundation
Microsoft
Ropes & Gray

**Ezra Merrill Legacy Society**
Albert Gold
Bayard Henry
Dean E. Ridlon
Dozier Gardner
Ellen W. & Hugh F. MacColl
Eloise W. Hodges
Emily Hood
Judith Allen Ferretti
Lionel Spiro
Marion Nierintz
Michael F. Stauff
Robert A. Lawrence
Thomas D. Bushman
William R. Huss
Anonymous (2)

"Words cannot express my gratitude for the opportunities you have given me to engage with ESC clients and to enjoy a sense of fulfillment and satisfaction assisting them to succeed in the future in a small way." —Andy Jasse, ESC Consultant
## FINANCIAL OVERVIEW

### October 1, 2018 through September 30, 2019

### Unrestricted Revenue and Support

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donated professional services*</td>
<td>$2,514,855</td>
<td>$2,598,899</td>
</tr>
<tr>
<td>Contributions</td>
<td>$77,976</td>
<td>$83,660</td>
</tr>
<tr>
<td>Special Event Revenue**</td>
<td></td>
<td>$53,369</td>
</tr>
<tr>
<td>Fee income</td>
<td>$492,436</td>
<td>$487,332</td>
</tr>
<tr>
<td>Satisfaction of program restrictions</td>
<td>$45,964</td>
<td>$80,787</td>
</tr>
<tr>
<td>Income from spending policy &amp; Investments</td>
<td>$73,247</td>
<td>$66,872</td>
</tr>
<tr>
<td><strong>Total unrestricted revenues and support</strong></td>
<td><strong>$3,204,478</strong></td>
<td><strong>$3,370,919</strong></td>
</tr>
</tbody>
</table>

### Expenses

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program services</td>
<td>3,079,561</td>
<td>3,148,518</td>
</tr>
<tr>
<td>Management and general</td>
<td>111,142</td>
<td>121,830</td>
</tr>
<tr>
<td>Fundraising</td>
<td>45,447</td>
<td>57,398</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>3,236,150</td>
<td>3,327,746</td>
</tr>
</tbody>
</table>

### Change in net assets

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in unrestricted net assets</td>
<td>(31,672)</td>
<td>43,173</td>
</tr>
<tr>
<td>Change in net assets with donor restrictions</td>
<td>(3,749)</td>
<td>56,165</td>
</tr>
<tr>
<td><strong>Total change in net assets</strong></td>
<td><strong>(35,421)</strong></td>
<td><strong>99,338</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net assets, beginning of year</td>
<td>1,863,705</td>
<td>1,764,367</td>
</tr>
<tr>
<td>Net assets, end of year</td>
<td>1,828,284</td>
<td>1,863,705</td>
</tr>
</tbody>
</table>

### FY18 unrestricted revenue and support

- Donated professional services*
- Contributions
- Special Event Revenue**
- Fee income
- Satisfaction of program restrictions
- Income from spending policy & Investments

### FY18 Expenses

- Management and general
- Fundraising
- Program services

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

**Net of direct donor benefit expense