



Report To the ESCOT Community 2007-2008

To help not-for-profit organizations, educational and governmental units solve organizational issues and operational problems by providing high quality consulting services at low cost.

In carrying out that mission, ESCOT's management consulting volunteers have been sharing their professional experience for more than two decades to help hundreds of organizations chart their courses and institute procedures to maximize their ability to be of service to the community. But we not only talk the talk, we walk the walk.

Over the past two years, ESCOT has been conducting strategic planning to build our own capacity to most effectively aid nonprofits, schools and government offices in addressing the challenges of these difficult times and help them prepare for today and tomorrow's generations.

We've also been increasing our outreach to heighten awareness of our services and the opportunities for satisfying volunteer work. We've expanded practice areas of our consultants, in such areas as information systems/technology, marketing and school-related issues to meet growing needs, as well as ongoing requests for consultations on board development, strategic planning, finance, human resources, operations, policy and procedure. This growth has enabled us to create consulting teams that bring combined skills tailored to a particular organization's concerns. In addition, ESCOT has continued to provide executive coaching helpful for new executive directors and those seeking a voice of experience on specific issues.

This report of our work in 2007-2008 is dedicated to the memory of Jim Gallagher, long-time ESCOT consultant and member of our Board of Directors who passed away July 14, 2008. Jim was passionate about his management consulting assignments and ESCOT's strategic planning initiative to continue to be a practical resource and partner in the community.

We seek your involvement, your thoughts on how we can be of service, your support, and the opportunities to create more teams to help more area organizations. We welcome your call.

Robert Wolfgang
Chair, Board of Directors

Beth Krueger
Executive Director

PROJECTS – Strengthening Community Organizations

ESCOT's management consulting services are designed to help strengthen organizations, address new challenges, increase efficiency and effectiveness. Our repertoire includes the entire spectrum of improvement efforts, which are usually undertaken by means of a study with specific objectives. Typically, ESCOT brings together teams of two to four people with the particular skills and experience for the type of study needed by our clients. A study can involve from 60 to 300 volunteer hours.

During 2007-2008, we conducted projects in Albany, Saratoga and Schenectady counties for community centers, a humane society, World War II veterans, public and private schools, performing arts facility, arts center for children and families, cemetery association, organization dedicated to empowering girls, an alternatives to incarceration program, and service for seniors and persons with disabilities. Projects involved:

- ***Strategic Planning*** – Helped to develop multi-year plans to achieve goals selected by clients. Our teams facilitated the discussion of alternatives and the selection of key objectives as well as means of achieving these objectives.
- ***Management and Operations Review*** - Conducted comprehensive reviews of policies, procedures and provided guidelines and recommendations means to enhance management of services.
- ***Staffing, Human Resources Procedures*** – Evaluated staff responsibilities and related procedures to help organizations and schools meet their growing and changing needs.
- ***Title and Salary Structure*** - Identified the knowledge, skills and abilities needed to carry out different positions and compared the salaries being offered by the client to salaries for similar positions by competitive organizations.
- ***Technology Improvements*** – Assessed reporting, communications needs and recommended upgrades in technology and training to increase effectiveness and efficiency.
- ***Resource and Fund Development*** – Evaluated and made recommendations to broaden client organization resources, funding opportunities, and community outreach, and conducted training for staff and board members.
- ***Board Development*** - Worked with boards of directors to identify means of tapping time and talent, and enhance roles, involvement, procedures, and community outreach.
- ***Marketing and Public Relations*** - Assisted clients in developing marketing and public relations plans to inform the community of services and opportunities, broaden outreach.

ESCOT teams also provided:

- **Coaching** - Provided experts to meet with a client to discuss individual and topical problems facing a manager. In this situation, a manager is free to select topics as they arise in daily work and obtain a rapid response.
- **Free Assessments** - Offered help clients, including a start-up and potential start-up, identify both the nature and extent of a problem they were facing.

Each project was designed for the specific needs of the client. Our teams strive to provide the maximum service to the clients we serve, knowing that every improvement benefits the community at large. We conducted evaluations of our performance at the end of each study.

FACILITIES AND FINANCES – Supporting Our Services

With the planned expansion of library facilities in Albany, it was necessary to relocate ESCOT's offices at Hope House, located in the Pinebush library branch building. We appreciate our new home at the LaSalle School, at 391 Western Avenue in Albany, and thank Hope House for its support over the years.

ESCOT continues in a strong financial condition. We charge a minimal fee to our clients, on a sliding scale based on project complexity and organization resources - and rely on grants and donors to cover our remaining costs. Also, each member of our Board of Directors made personal donations to supplement their gifts of time. Because of our extensive volunteer service, our one-person staff, and provision by LaSalle of office facilities and meeting space, the income we need is much lower than that required by most organizations.

VOLUNTEERS - Giving Time and Talent to the Community

Volunteers shared their expertise for community benefit by serving on teams for consulting management projects to aid area nonprofits, schools and government offices. A number of volunteers worked on more than one project. Each year, volunteers are recognized at the annual meeting; in 2007-08, we honored:

Herb Alfasso

Christy Carton

Kathy Condon

Terence Curran

John Curtin

Wilma DeLuco

Richard Desrochers

Sandra Fernandes

Robert Fisher

Genevieve Foulks

James Gallagher

Bernard Geizer

Dom Gieras

Lance Jackson

Martin Kenosian

Beth Krueger

Mark Rosenholz

Lynette Seawall

George Smith

Miriam Strope

Jeffrey Swain

Robert Wolfgang

EDUCATION – Learning From Each Other

We welcomed new consultants from the public, nonprofit, academic and private sectors in such areas as human resources, marketing, public relations, facilities, technology, organization development, strategic planning, finance, and education. Orientations were conducted for our new volunteers.

Our consultants are all experienced administrators and managers. One of the benefits of participation in ESCOT is the opportunity to work with and share insights with each other, and obtain continuing education. We offer consultants several training opportunities each year so that they can keep up to date with changes in the management field. A 2008 panel discussion focused on effective consulting procedures and roles, meeting today's needs, and issues encountered in projects and development of recommendations.

ESCOT also presented educational forums that brought together our consultants with representatives of community organizations, government and educational offices to discuss operational issues, trends and challenges, and how ESCOT can help. Reflecting priority concerns affecting nonprofits, the forum in 2008 provided a dialogue on “More Than Survival: Tactics for Tough Times to Make a Difference in Your Organization” in such areas as organization management, fund and resource development, marketing and public relations. In 2007, the program topic was "Let's Collaborate": How to Determine If That's *Really* a Good Idea and How to Make a Joint Venture Work Effectively for Your Nonprofit.” ESCOT appreciates the support of KeyBank in sponsoring the presentation of that forum.

ESCOT also gained the input of its advisory committee with extensive service to the community:

- *John Feeney* - Retired Chancellor, Albany Catholic Diocese
- *Karen Johnson* - Director of Development, Proctor's Theatre
- *Dr. Margaret King* - Assistant Dean, Student Development,
Schenectady County Community College
- *Katherine Pelham* - President, United Way of the Greater Capital Region
- *Frank Thompson* - Professor and Retired Dean, Rockefeller College of Public Affairs
- *Barbara Zaron* - President, Office of Management Confidential Employees

NATIONAL NETWORK - Exchanging Information

ESCOT is part of the national Executive Service Corps Affiliate Network, composed of executive service corps in more than 30 cities across the nation. While each ESC is independently chartered, ESCAN enables affiliates to share experience in such areas as education, marketing, and the latest management approaches that we can use to support our volunteers and clients.

ORGANIZATION - Charting Our Course

In addition to setting policy, the Board of Directors undertook a strategic planning process, led by George Smith, for organization development, structure, service and outreach. We thank the Charitable Venture Foundation for support of our capacity-building initiative. Board members and consultants served on committees dedicated to: volunteer development and educational programs (Richard Desrochers, Chair); financial management and budgeting (Mabel Murphy, Chair), and marketing to ensure awareness of opportunities and services available to the community through ESCOT (Jeffrey Swain, Chair). This extra contribution of service by board members and consultants ensures that charges to clients are the minimum possible amounts for our services.

The following served on ESCOT's Board of Directors (* also serving on the Executive Committee):

*Robert Wolfgang (Chair)**

Owner, Albany Aqua Ducks; retired, Albany Police Dept.

*Charles Murphy (Vice Chair)**

Retired, Rockefeller College, SUNY

*Daniel Egan (Secretary)**

Retired, Peter Young Housing, Industries and Treatment

*Mabel Murphy (Treasurer)**

Retired, NYS Dept. of Taxation and Finance

Terence Curran

Professor Emeritus, Siena College

John Deffigos

Retired, NYS Science and Technology Foundation

Richard Desrochers

Retired, Vanderheyden Hall

Jane Gorzelnik

Retired, Hudson Valley Community College

Lance Jackson

Retired, Northeast Parent and Child Society

Martin Kenosian

Retired, NYS Department of Civil Service, Municipal Division

*Lynette Seawall**

President, Performance Plus

*George Smith**

Retired, NYS Department of Civil Service

Jeffrey Swain

Retired, Office of New York State Comptroller

*Beth Krueger**

ESCOT Executive Director