

## ESC-US Presentation

### “Proving Our Value: Components of a Successful Development Program”

September 13, 2019

#### Approaches and stories that resonate with grant makers (Felicity)

##### Approaches:

- We offer options
  - General operating
  - Capacity
  - Tech
  - Programs (EDLI, DDP)
  - Sponsorships
  - Collaborative Project
- We don't chase dollars and we avoid mission creep, but we are open-minded

##### Information Gathering

- Always thinking/asking program staff: what do you need, and who might fund it?
- Our Consultants are also a resource
- We talk to funders and learn what aligns with what they care about
- E.g. Collaborative Projects emerged from noting funders who “only fund X” (e.g. Dwight Stuart Youth Fund) – well what if we did a cohort that served X?

##### Tactics:

- When space allows, a combination of statistics and stories usually work better than one or the other
- We often include quotes e.g. At graduation in November 2018, the participating Executive Directors reflected on their coaching relationships with their ESC consultants, citing the importance of being able to openly discuss challenges in their leadership journeys. Jessica Ellis, Executive Director of Centinela Youth Services, stated *“Getting a coach was huge for my emotional survival in this job!”* For many, EDLI sparked a deeper examination of how to expand their impact; several Executive Directors contracted with ESC for additional projects, including Strategic Planning and other consulting services. In one powerful testimonial, Fatima Djelmane Rodriguez, Executive Director of Camp Ronald McDonald, shared, *“I was able to navigate my first year as Executive Director with ease and grace, largely thanks to EDLI and my coach. My knowledge base about my role, supporting staff, the program, and advocating for myself was greatly impacted.”*
- We talk about our “unique, innovative service model”
  - Long-term
  - Coaching-based

- Sustainable
- Transformation
- “guide from the side” rather than top down
- Volunteer-based, less worried about “billable hours”
- Flexible (can add thought partners from the corps as needed during engagement)
- We talk about our consultants, how talented and dedicated they are, how we vet, onboard and train them “we leverage their skills and talents”; and how we carefully match them
- Unmet need on the one side; proud, talented group of seasoned professionals on the other
- We quote from reports and studies:
  - Weingart Foundation Survey on Capacity Building Needs in the LA area (2010)
    - Showing demand for coaching and that “nonprofit organizations in Los Angeles County report that cost is the single most significant obstacle to accessing capacity-building services.”
  - UCLA Luskin School of Public Policy Survey on The Generosity Gap (2016)
    - Showing how local giving has gone down in LA since the 2008 recession and has not returned to previous levels – we help our clients find dollars
  - CompassPoint Report on Coaching and Philanthropy (2010)
    - Showing that —“executives were most likely to assess executive coaching, peer networks, and leadership programs as very effective”
  - CalNonprofits Report “Causes Count” on the impact of the NP sector in CA (2014)
    - Nonprofits rank as the 4th largest industry in California by employment, producing more jobs than the construction, finance, or real estate industries.
  - Find similar reports in your city/state/region

### **Metrics that work for us (Felicity)**

- Numbers that were easily measured even before Salesforce:
  - # of projects and clients per year (projects count as clients served not contracts e.g. if we have a contracted to provide 9 leadership coaching clients, we count each as a project)
  - # of participating nonprofits in our EDLI and DDP programs each year
  - Directly Served: Based on # of clients per year, we started estimating “4-5 individuals per client” (i.e. sometimes 1, sometimes 10) x the number of projects in that year = 500 – 625 a year
  - A couple of years ago, we did an informal count of how many people our CLIENTS were claiming to impact, and started saying “Ultimately our work impacts as many as 2 million individuals annually, based in a sampling of the total number of individuals served by our clients.”
  - 100% Board Giving, 60% Consultant Giving, 100% Staff Giving and 100% CAC Giving
  - Evaluation initiative: 91.3% of last cohort of clients evaluated were “Satisfied or Very Satisfied” with their experience with ESC.
  - Increased staff size 7 to 13 since 2015; number of volunteers
  - Diversity statistics, improvement in consultant diversity over time
  - Even before SF we had our old Access database and, while it took longer, we would create a list of clients (100) and then train a summer intern to do internet research

categorize by geographical region, budget size, and mission area using Excel and then creating pie charts etc. for those for our annual report

- Likewise, before the Service Log, we had consultants estimate the number of hours in a type of project (e.g. LC), then count up the # of each type of project and multiply by the average # of hours.
- Strengthened Metrics Since Service Hours Log; Salesforce; New Evaluation Initiative:
  - Service Hours Log: started having consultants record in in 2015, has gone up every year 7,000 in 2015 to 11,500 in 2019
  - Now, instead of doing it at the end of the the year, we have staff enter into SF the region, budget and mission as soon as they do intake on the client. So now geographical region and mission area and budget size are easier to report than they used to be; we can report dynamically if we wish (we don't just update it once a year)
  - Salesforce allows us to pick two dates and report on # of clients and projects between those dates
  - Sort and filter by number of collaborative projects launched in X period and how much revenue \$\$\$ from each area
  - During X years we've seen an increase in the # or % of arts-based orgs coming to ask for assistance (we can now speak to trends in way we couldn't before)
  - Sponsorship Tracking: easier to report to funders on how much offered, spent etc.
  - As we rollout our revived Evaluation Initiative, we look forward to being able to share more accurate data in those areas too
  - We're also in the midst of a project to collect more demographic data about our staff, board, volunteers and clients, for multiple reasons but certainly including demand from grantmakers

#### **Q&A plus Participant Discussion** (David facilitates)

What has worked for others in grants and what has not? (practical examples so we can see/feel for ourselves)

**How have you used X stat?**