



ONLINE BULLETIN

National Executive Service Corps

From Connecticut

For Connecticut Public Schools, NESc Offers a Rich Menu

Need help launching a newsletter? Or assessing how well an internal operation functions? Or evaluating a new program? Or squeezing the most efficient use out of limited floor space?

For many public schools in Southwestern Connecticut, the answer to all of the above has been a loud "Yes." And for this help they have been turning to NESc's Southwestern Connecticut office. In recent years, NESc has assisted, among others, the Public School systems of Bridgeport, Fairfield, Greenwich, New Canaan, New Fairfield, Norwalk, Stratford, Trumbull, Weston, Westport and Wilton.



Connecticut's Al Atherton

Kudos. This work has earned kudos. "I enthusiastically recommend [NESc] to any school system in need of outside consulting services," says Wilton Public Schools Superintendent Gary G. Richards. Adds New Canaan Public Schools Superintendent David E. Abbey: "We found the NESc associates to be knowledgeable, highly professional and very supportive. Our experience could not have been better."

NESc's work for these schools reflects the rich menu of services that NESc has been offering nonprofit groups across the New York Tri-State area for more than a quarter-century. Its help to Connecticut schools has included:

- Assessing the organization** and operation of a school's Central Administrative Office
- Creating** a distributing a school newsletter
- Reviewing the structure** of a school's Finance and Human Resource ops
- Evaluating school office** layouts
- Evaluating a school's office administrative** structure
- Proposing changes in workflow** and computer support for a school's Human Resources Department
- Analyzing a Pupil Services** Department
- Comparing per-pupil** outlays in three school systems
- Assessing a school's** health insurance program.

"Our effective consulting, persistent follow-up and word of mouth have created this track record" says Al Atherton, NESc Southwestern Connecticut's Director of Operations, explaining how NESc became so involved with the area's public schools. "And because Bill Burke, our Vice President of Client Relations, now has a personal relationship with local superintendents, they know the kind of affordable help NESc can supply."

FOR A BROCHURE OF NESc SERVICES FOR SOUTHWESTERN CT SCHOOLS, CONTACT BOB HAVEMEYER, DIR. SALES AND MARKETING, NEScSTAMFORD@SBCGLOBAL.NET.

PROJECTS UNDERWAY

New Jersey. Professional Executive Coach Tom Colleton, Jr., is training the executive director of a Catholic social services agency serving seniors, AIDS and substance abuse patients.

Connecticut. Consultants Mico Loschiavo and Mitch Dickey are assessing how Stamford-Greenwich's National Alliance for the Mentally Ill can bolster its relationship with the statewide NAMI.

Manhattan. A marketing strategy orientation process is being conducted for a large community service organization that delivers healthcare and social services throughout the NYC region.

Connecticut. Al Atherton completed a 4-month stint helping the Stamford-Greenwich Shelter for the Homeless finish its annual audit. Don Peterson will be serving as interim exec director of Wethersfield's Webb-Deane-Stevens Museum, planning the 225th anniversary of the Webb House's role in hosting George Washington as he planned the Yorktown Campaign.

Staten Island. Nearing April's culmination of a 2-year project, NESc is midwifing the ambitious borough-wide "Art of the Game" project designed to use sports' popularity to induce youngsters to attend cultural and arts venues.

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Galina Vilkina

Remedy for haphazard accounting & bookkeeping.

New Services

Financial Systems Package

Few tasks irritate non-profit organizations as much as keeping their financial books. They must master complicated systems, comply with myriad government regulations and divert time and resources that, they rightly feel, better would be directed at fulfilling their missions. The result, in many instances, is haphazard accounting and bookkeeping that not only are chaotic but, more important, deprive the organization of valuable tools to measure and thus improve performance.

Pain-free. Some non-profits are beginning to solve these bookkeeping woes by taking advantage of a new NESC service – the Financial Systems Package, a pain-free, systematic and low-cost way for non-profits to bring order to their books. Organizations in Westchester County, downtown Manhattan and Brooklyn Heights already have

signed-on for a Package.

Although each Package is custom-designed, elements of the existing packages demonstrate the range of NESC services. These include:

- Meetings of the organization's staff with NESC consultants who evaluate the current bookkeeping and accounting systems
- An NESC-designed blueprint and timeline for adopting a new system
- NESC-crafted budgets for the organization
- Off-the-shelf bookkeeping software installed by NESC
- NESC training of the organization's staff in using the software
- NESC guidance in restructuring the book-

keeping system and in setting up a new series of accounts compatible with the software

- NESC help in designing periodic software-generated reports that become valuable management and budgeting tools
- On-going monitoring by NESC of the new bookkeeping system, including participation in monthly management meetings that review the organization's financial health
- NESC assistance in filing the 990 reports with the IRS

On-call. Once the system is set-up, NESC Consultant Galina Vilkina is constantly available by phone or Internet, to answer questions and address crises

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Made in New Jersey

Demystifying the Strategic Plan

“Strategic planning.” Initially that often sounds like a great idea to nonprofits, who then balk since they typically have no idea of how it works or, more important, how they ever can use the results of the “Strategic Plan.” What they fear is getting something else that just accumulates dust on their shelves.

Hesitant nonprofits toying with the notion of a strategic plan, should chat with NESC’s New Jersey team – Regional Director Margean Gladysz, Alberta “Bert” Edwards and Henry Weiss. On February 4, they led a strategic planning retreat for the board and senior executives of Arc Mercer, Inc., which runs innovative social, education, custodial, recreational, training and employment services for developmentally disabled children and adults in Mercer County, NJ.

Action steps. The NESC team’s aim was an actionable plan that Arc Mercer actually could execute. First the team explored Arc Mercer’s outside environment and competition; then it analyzed its strengths and limitations. From this the team crafted the vision and – most important – action steps for reaching reach the goals, assigning each step to an Arc Mercer staffer, with a firm deadline for completion. At six month intervals, NESC will review progress towards the goals.

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Another New Service

Fundraising Implementation

Gradually but increasingly, NESC is broadening its menu of services and products from traditional consulting to help in executing the policies it recommends. Typifying this expanded charge is its year-old Fund Raising Implementation Service. With Manhattan's Icla da Silva Foundation and the Helene Fuld College of Nursing, for instance, NESC has rolled up its sleeves to help in raising money.

2nd most popular. In many ways, of course, offering assistance in executing policies is a natural extension of what NESC has been doing. Helping nonprofits define fundraising goals and operations, in fact, recently has been NESC's second most popular service, ranking just behind

NESC's marketing consultancies. Typically, NESC would send in a team of Consultants who first would survey an organization, the environment in which it operates and the competition it faces for donor dollars, then interview Board members and staff and, ultimately, produce an analysis and set of recommendations for ways to raise more money.

Some organizations wanted more from NESC – a seamless transition from recommendation to hands-on execution. Responding to this, NESC last year mobilized Consultant Barbara Taylor, a fundraiser for New York City-area nonprofits.

Moving in. In arrangements costing clients a

small fraction of what they would pay commercial fundraising firms, NESC literally moves in with the client, spending as much as a couple of days a week on premises, identifying potential new donors, defining the fundraising role of the client's Board, writing proposals and even joining the client in donor meetings. Says George Schneider, NESC vp for development, who conceived this new fund-raising service: "We now offer NESC clients a fundraising continuum – from analysis to recommendations to execution. And at a reasonable fee." Those already using this service would seem to agree.

FOR INFORMATION: GEORGE SCHNEIDER; GSCHEINER@NESC.ORG



George Schneider

"We now offer clients a fundraising continuum — from analysis to execution."

NESC PRODUCTS & SERVICES

Business & Strategic Plans – helping nonprofits reach new goals by honing vision, resolving conflicts over priorities, allocating resources and identifying new opportunities.

Marketing Blueprints – analyzing a nonprofit's services and designing a blueprint to market them dynamically.

Feasibility Studies – assessing feasibility of plans for new programs or even new spin-off organizations.

Budgeting Assistance – assigning former chief financial officers to help craft realistic multi-year budgets.

Fund-Raising Strategies – crafting fund-raising operations and identifying new sources of contributions.

Recruiting Top Executives – industry-standard executive searches that tap into new universes to fill top slots.

Leadership Training – workshops and drills to hone skills of senior execs.

Board Development – identifying new ways boards can help a nonprofit and then recruiting new board members.

Facilities Assessment – surveying space uses and suggesting changes to save money and boost productivity.

Project Management – suggesting changes in how nonprofits manage projects to raise efficiency and cut costs.

Media Relations – designing operations for earning more media coverage and raising a nonprofit's public profile.

Human Resources – conducting organizational audits to identify more effective staff uses

Executive Advice – working one-on-one with CEOs on a broad range of organizational and operational issues.

Financial Management – designing bookkeeping and payroll systems and supervising their operations.

Broad skills.
Deep
Experience.

From adult
training to
college
application
processes to sales
& advertising to
retailing financial
planning. .



Welcoming

NEW ON THE NESC TEAM

Recently joining NESC as Consultants are:

Katherine W. Hanaway. An impressive background heading adult education organizations, having served as director of the Adult Training and Development Network (Connecticut Capitol Region Education Council) and director of Continuing Education at Hartford College for Women. Has led training sessions on learning styles, team building and differentiated instruction and was a trustee of Hartford College for Women. Graduate of Smith College (BA) and Univ of CT (MA in Education).

Caroline S. Moore. An intriguing double-faceted career bridging the nonprofit and commercial worlds and an expert in the college application procedure. Serving for a quarter century at universities – first as Bryn Mawr College’s Special Student Program Director and then as Princeton’s Regional Admissions Director – and then as president and ceo of family-owned Craft Industries, where she was involved deeply in sales, advertising and manufacturing. Graduate of Bryn Mawr College (BA) and Temple University (M.Ed).

Julian Taub. A strikingly accomplished retailer, strategic planner and financial officer with more than four decades associated with such iconic American emporiums as Bloomingdale’s (CFO and svp for Financial and Strategic Planning), Gertz Department Stores (Sales Promotion Director), Korvette’s (vp for Planning) and Abraham & Straus (responsibilities ranging from trainee to Research Director). Now advises retail clients on how to boost sales and profits. Graduate of MIT (BS in engineering).

Case History

Tough Verdict for a Junior League Thrift Shop

Increasing revenues at their thrift or gift shops is something that many nonprofits sensibly seek. And helping them do this is something for which NESC is particularly qualified, since many NESC Consultants boast very distinguished retailing backgrounds.

Not pretty. Thus there was nothing unusual about the challenge offered when the Junior League of Long Island asked NESC to review its Thrift Shop ops. The NESC team began by interviewing JL staff, shop managers and JL sustaining members, probing their attitudes on volunteering their time or donating merchandise. Then NESC re-

viewed five years of financial statements and examined staff policies and procedures. After that, the team visited the shop several times to see how merchandise is displayed and priced.

The NESC verdict was not pretty: Though the Thrift Shop was financially sound, its actual operation was at best mediocre, with serious problems in merchandise display and pricing consistency. What made matters worse, donated merchandise was not processed promptly, overcrowding storage space. The NESC report recommended improvements in these areas and set objectives.

The report also strongly urged improvements in the Junior League’s financial reporting, such as separating JL overall expenses from Thrift Shop outlays. Without this, stressed the report, JL could not know how much money the Shop actually earns.

Sound plan. All of this made sense to the JL. Said its past co-Chair Caroline Chamberlain: The report “gave us a sound plan to streamline operations and improve our revenues in the coming years.”

Connecticut Notes

BOB HAVEMEYER NEW VP. NESC's Southwestern Connecticut Region has named Robert G. Havemeyer as its vice-president and regional director of sales. In this newly created position, he will share the region's leadership with Allan Atherton, whose new title is vp and regional director of operations.

Active in NESC since 2000, Havemeyer has served as consultant to the Greenwich Family YMCA. The Salvation Army, Senior Services of Stamford and the Westport, New Canaan, Wilton and Trumbull Public School Systems. Before founding his own consulting firm, the Havemeyer Group, in 1985, he was a partner of Stevenson, Jordan & Harrison and svp of Case & Co., Inc. He earned both BA and MA degrees in industrial engineering from Columbia University.

STRATEGIC PLAN FOR HISTORICAL SOCIETY. Central CT Regional Director Elaine McDonald and new Consultant Katherine Hanaway will be crafting a strategic plan for a Connecticut historical society whose vast collection includes documents, photos, artifacts and oral history tapes. The organization is turning to NESC for help in establishing an orderly process for using its limited staff and funds most effectively. Says McDonald: "As with other historic museums, this historical society is struggling not only to define itself to the public but also to capitalize on its collections and other assets – and maybe even find ways to commercialize them."

Last Word

"It's Great to be Captain of the Team"

I am delighted to be leading NESC as its new President. For almost three decades, NESC has offered valuable consulting services to our nonprofit clients, making them more effective as they serve their constituencies. It's great now to be captain of that team.

In fact, effective nonprofit management and operation have been my passion for many years. As an active volunteer throughout my business career, I have seen firsthand the importance of nonprofits bringing effective leadership, organization – and sufficient funding – to their organizations.

From overseeing 20 community outreach projects in Fairfield County, CT, in the 70s, to founding and chairing a Dubai art society in the 80s, to my current active roles in the National Association of Women Business



**NESC President
Betsy Weber**

Owners and the Yale Alumni Chorus Foundation, I always have sought to motivate people collectively to reach the goals of the organization. I thus think that I know well the challenges faced by nonprofits.

While many of you surely have experienced our services in strategic planning, marketing and branding, fundraising and Board development, were you aware that we also deploy expertise in space utilization, coaching and mentoring, succession planning, project management and executive search? Several of our consultants are even, hands-on, helping nonprofits with their financial accounting records.

Our consultants – more than 400 of them – are our most valuable asset. We are always looking for new consultants, offering them a meaningful "second career" along with a way for them to give back to their communities. NESC creates a rich consulting environment; they deliver the services and expertise to our clients. They are an impressive group and I feel privileged to work with them.

And now, our consultants are beginning to go a step further in helping clients; they soon will be running what we tentatively are calling our "Workshop on Implementing Change." This will take the client beyond the final page of, let's say, an NESC strategic plan and advise the client on how to execute that plan. Stay tuned for more details.

In the meantime, I recognize that the challenge to NESC is clear. To serve you well, we must organize and deploy our assets to ensure that NESC is the *resource of choice* for nonprofits. I am committed to meeting that challenge, and I look forward to working with all of you.

Betsy Weber

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