



ONLINE BULLETIN

Healthcare Services

NESC Helps Cabrini Eldercare of New York Improve its Visibility with a Comprehensive Marketing Plan



Jerry Schiller
Sector Head,
Healthcare Services

Jerry Schiller, Sector Head, Healthcare Services reported successful completion of a branding/marketing engagement for Cabrini Eldercare. With facilities in Dobbs Ferry and Lower Manhattan, Cabrini provides its communities with a variety of services. The programs include nursing homes, home healthcare, rehabilitation, adult day care, senior housing and immigrant assistance. Wishing to enhance awareness of the organization's vital purpose throughout their venues, Cabrini management engaged NESC to develop plans to improve its visibility among their community of users, referrers, potential contributors, funders and prospective board members.

The NESC Consulting Team led by **Lloyd Highbloom**, which included **Eleanor Holtzman, Ira Schwartz, Marlene Ferber, Jon Goldfarb, Gayle Haller, Joan Malkin, Av Rivel**, developed in-depth descriptions of Cabrini's current service offerings at Dobbs Ferry and Lower Manhattan. In addition to conducting interviews with key players, the consulting team also reviewed relevant documentation, including history, marketing activities, revenue expectations and future prospects. In close cooperation with Cabrini staff, the NESC team evaluated and defined the parameters used to create the branding/marketing plan that the client requested. The plan and Cabrini's new tagline, "We love caring for people," was enthusiastically accepted.

Central Connecticut

NESC to Implement Its Strategic Plan for Bristol Historical Society



Elaine McDonald,
Central Connecticut
Regional Director

Bristol, CT has an important place in Connecticut's history because many manufacturing innovations have their roots in Bristol. For more than 30 years, the Bristol Historical Society has played an important role in promoting an interest in, and appreciation of, Bristol's history through its collections and interpretation of its historical resources.

This all-volunteer organization has been successful and in early 2010, the Board recognized the need to advance the organization in order to continue its success. The Board, members and the community at large had many good ideas for growing it. Therefore, the Board decided it would be beneficial to engage the services of NESC to help vet these ideas in an organized way and develop a plan to capitalize on all of their assets.

The hardest part of strategic planning comes not in the planning, but in the plan implementation. This is something the Bristol Historical Society Board Planning Committee acknowledged and decided to engage NESC not only to help them develop their new strategic plan, but also to work with the Board Committee to create a formal implementation plan. Consultant's **Terry Roberts** and **John Davis** were the ideal team to take on this assignment, due to their combination of executive and operational leadership experiences.

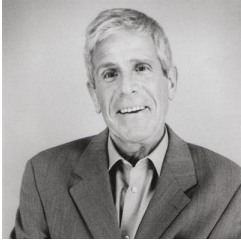
According the **Richard Rich**, the Second Vice President of the Society, "Through a series of meetings, Terry and John helped us filter the volumes of data so that we could select a few priorities to begin this new era at The Bristol Historical Society. We're now working with them to finalize our implementation, plan which holds great promise for the Society.

INSIDE

New Appointments	2
Hearst Foundation Grantor	3
Tribute from Client	3
6th Annual Gala Highlights	4
Norwalk Education Fdn	5
Lifetime Achievement Award	6
Executive Search	6
John Kirksey Update	7
"Last Word"	7

New Sector Head

Joseph Townsend Heads New Social Enterprise Sector



Joe Townsend,
Social Enterprise
Sector Head

In recognizing the growing importance of social enterprise in the nonprofit community, **Betsy Weber** recently announced that **Joe Townsend** will head the new Social Enterprise Sector. In today's economic climate, our clients and prospects are seeking means to generate additional income to supplement declining revenue streams. The NESC has completed or is in the process of completing six social enterprise assignments that will generate earned income for the nonprofit client using and/or monetizing underutilized assets that are related to their mission. Joe emphasizes that with increasing competition and declining traditional revenue sources, it is more crucial than ever that nonprofits fully explore earned income possibilities from social enterprise activities to achieve a more consistent cash flow.

Board Recognizes CFO

Jon Goldfarb Appointed Senior Vice President



Jon Goldfarb,
SVP and CFO

At the December Annual Meeting of the NESC Board of Directors, **Jon Goldfarb**, who has been our CFO since 2004, was given the additional title of Senior Vice President. In addition to his duties as CFO, Jon has been an active volunteer consultant in a number of client assignments involving financial management.

Marv Berenblum, Chairman and CEO, remarked "The Board awarded this additional title to Jon in recognition of his many years of dedicated service and commitment to NESC's mission of providing quality consulting services to the nonprofit community. Jon's many leadership contributions in the areas of financial administration and consulting have proved to be invaluable to our clients and to many NESC colleagues."

Prior to joining NESC in 2002, Jon was an investment analyst on Wall Street for 32 years. The last 25 years of that time were at Merrill Lynch where he was a Managing Director and Senior Analyst for the Fundamental Research Department. Mr. Goldfarb is also an arbitrator in securities cases for the Financial Industry Regulatory Authority. He is a Char-

tered Financial Analyst.

Jon has an MBA in Corporate Finance from Harvard Business School and a BA in Economics from Hobart College, Geneva, NY where he was named outstanding member of his graduating class. He and his wife live in White Plains, NY.

New Sector Head

Anne Finn to be Social Services Sector Head



Anne Finn,
Social Services Sector

Betsy Weber, NESC President, recently announced that **Anne Finn** was appointed the Head of the Social Services Sector effective January 1, 2011. Anne has served as volunteer consultant for the NESC for the last two years.

Ms. Finn is an experienced executive in consumer marketing with expertise in strategic planning, execution and development. She is a proven negotiator, problem solver and facilitator focused on goals and profitability. Anne was a SVP Consumer Marketing at Magazine Publishers of America, New York, from 2000 to September 2008. She previously was a Vice President for Corporate Consumer Marketing for MacDonald Communications Corp., New York where she was responsible for executing circulation programs for *Working Woman*, *Working Mother*, and *Ms. Magazine*. Earlier Ms. Finn was a business development and marketing executive for the Weight Watchers Publishing Group, New York.

Arts and Culture Reception

Grants Director of Hearst Foundations Meets With NESC Clients at Annual Arts & Culture Reception



Mason Granger,
Grants Director

Mason Granger, Program Director for Grants at **The Hearst Foundations**, had many friends at the Salmagundi Club on October 26 where he appeared as Guest Speaker at the 17th Annual Wine and Cheese Reception hosted by **Betty Lefferts**, Chair of NESC's Arts & Culture Sector. He remarked that at least 30 organizations attending the reception received grants from one of the Hearst Foundations during the last three years. Mr. Granger, formerly President of Granger, Inc. and The Granger Group in Charlotte, NC, was appointed Program Director of Grants, effective January 2008. He and two colleagues at the Foundation must unanimously approve all grant requests.

A record number of attendees listened attentively as Mr. Granger explained the process used by the Hearst Foundations to consider grants. Started in 1945 by William Randolph Hearst, the Foundations operate independently from its parent company. Requests for grants should include the organization's goals, visions and strategies that are used to achieve its mission. Although grants are given in all 50 states, major amounts are awarded to nonprofits in the New York Metropolitan and San Francisco Bay areas. About 27% of grantees are engaged in the Arts & Culture sectors with the remaining given to Education, Health and Social Services organizations.



Betty Lefferts,
Richard J. Caples,
Lar Ludovitch Dance Company

Mr. Granger emphasized that 75 to 80% of all grants usually go to nonprofits that have previously been awarded grants. Once a grant is obtained, the organization is not eligible for a new grant for a period of three years. "We're nothing without you" was a frequent theme of Mason's remarks. In this regard, the audience was advised that The Hearst Foundations maintain an interactive relationship with their grantees for several years after a grant is awarded. Like most foundations, competition for grants has become more competitive in recent years with more proposals received and fewer dollars available. Still Hearst Foundations continue to award about 250 grants each year in amounts ranging from \$50,000 to \$500,000. If the organization has a compelling story to tell, it will likely find a favorable reception among the three decision makers. The Speaker repeated that "It's not just about the money."

During the Q&A that followed his prepared remarks, Mr. Granger stated that the Foundations generally do not support organizations with less than a \$700,000 annual budget. In reply to other questions, he mentioned that in addition to helping to fund programs, grants may be provided for capital projects, but are not provided to fund operating deficits.

Praise from Client

The Acting Company Gratefully Acknowledges Assistance from NESC Consultants

At the request of **Margot Harley**, the Producing Artistic Director of our Washington, DC-based client, **The Acting Company**, Judy Vernon, a senior NESC consultant addressed attendees at the Arts & Culture Reception on October 26 at the Salmagundi Club.

Introduced by Betty Lefferts who hosted the annual event, Judy explained that The Acting Club engaged the NESC to assist with its Board Development needs which included an overall assessment of its organization. An NESC suggested Board retreat that was also attended by outside stakeholders resulted in specific action plans that are now being implemented. Ms. Harley stated that steps are now being taken to revitalize, upgrade and activate a more responsive Board of Directors. She was most appreciative of the suggestions made by NESC consultant Judy Vernon and her assistant, Thomas Pierce.

Founded in 1972, the mission of The Acting Company is to promote theater and literacy, by bringing a touring repertory of classical productions, talented young performers and teaching artists together, particularly in areas where live performance and theater arts education are limited or non-existent.

Sixth Annual Gala

Community Leader Robert Catell Praises Work of Volunteers Cites Student Gains at the New Lourdes Academy in Brooklyn

The National Executive Service Corps (NESC) honored **Robert (Bob) B. Catell** for his commitment to public service, volunteerism and nonprofit organizations at its Sixth Annual Gala Award Dinner, held on November 3 at the Yale Club of New York City. Mr. Catell is Chairman, Advisory Board, Advanced Energy Research and Technology Center at the Stony Brook campus of SUNY. He is also the former Chairman and CEO of National Grid U.S. and of Keyspan Corporation.

Bob joined Brooklyn Union Gas Company in 1958 and served as its Chairman and CEO before retiring. Active in many nonprofit organizations, he lauded the NESC for its consulting services to the nonprofit community in the Metropolitan New York area. The 2010 Honoree devoted the core of his remarks to the educational achievements at the **Lourdes Academy in Brooklyn, NY** where he is Chairman. The Roman Catholic needs-based co-educational high school, established in 2008 is part of the Cristo Rey Network of high schools nationwide. It provides an affordable alternative for its mostly minority student body who seek a small, Catholic college preparatory school. Students work one day a week in a corporate environment which pays 65% of their tuition, and gives them an opportunity to identify their educational and career interests.

Additional highlights of the evening included a lively performance by the internationally acclaimed **Young People's Chorus of New York City (YPC)**, led by **Elizabeth Núñez**. The YPC is a client of the NESC.

TV News Correspondent, **Kelly Wallace**, was a most engaging Mistress of Ceremonies. She frequently prompted the audience to participate in the ongoing silent auction. As a fairly recent Mother of two young daughters, Kelly also discussed her keen interest in women's issues and parenting.



**Marv Berenblum, & daughter
Eve Goldberg**



**Left to Right- Arthur Mirante, Kelly Wallace,
Edward Miller, Bob Catell**



Young People's Chorus of New York City

Southwest Connecticut

NESC Offers Action Plan to Norwalk Education Foundation on Five Key Issues

The Norwalk Education Foundation (NEF) is a non-profit organization founded in the late 1990's to improve the quality of education for a diverse student population of about 10,500 in a network of 19 schools. The last several years have been marked by a turnover in the District Superintendent's office, but a new superintendent came on board during the consulting assignment..

NEF has pursued its mission by designing, operating and funding professional development, technology infrastructure and after-school programs to supplement those of the District. Recently, the District has been criticized for its students' poor academic performance. In response, NEF has become a public advocate for education improvement, a new role in addition to its normal program activities.

Alan McDougall served as Project Manager and was ably assisted by NESC Senior Consultants, **Catherine Ko** and **Stanley Stern**.

Questions posed to the NESC team included: (a) Where should NEF focus its energies, (b) What are appropriate goals, (c) How should NEF be organized, (d) What are the funding sources, (e) What is an appropriate level of advocacy, and finally, (f) How can NESC help NEF to develop a strategic plan for the next 3-5 years?

NESC conducted personal interviews with every member of the Board and staff; also with other stakeholders concerned with NEF's program activities, future mission and advocacy. These resulted in a SWOT (strengths, weaknesses, opportunities and threats) matrix. Further analysis determined that five "issue clusters" should be addressed: (a) Education Programs, (b) Advocacy, (c) Governance, (d) Fundraising and (e) Internal and external communications. Subsequently, each issue cluster was discussed with the Ad Hoc Strategic Planning Committee of the Board. Action plans were prepared for each of those five subjects to implement the overall strategic plan.

NESC PRODUCTS AND 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 multiyear 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 executives.

Board Development—identifying new ways boards can help a nonprofit; 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.

Human Resources—conducting organizational audits to identify more effective staff uses.

Executive Mentoring—working one-on-one with CEOs on a broad range of organizational & operational issues.

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

Financial Fitness—assessing opportunities for cost containment and revenue enhancement.

Social Enterprise—defining new mission-driven business activities to generate new revenue streams.

1922-2010

Nonprofits Mourn Passing of Richard Jacobs

We are saddened to report that Dick Jacobs, NESCS's dedicated consultant and friend, passed away on December 2, 2010. All who worked with him, clients and colleagues alike, admired his advertising, marketing, planning and board development skills as well as his warm and agreeable manner. He worked on a variety of projects including the Kings Bay YM-YWHA, Russian American Kids Circus on Stage and the Jewish Board of Family and Children's Services.

After graduating from the University of Pennsylvania Wharton School, he entered the U.S. Navy during World War II. As a Lieutenant on the USS Arkansas, he took part in D-Day, Iwo Jima and Okinawa. After the war, he joined the family business of Joseph Jacobs Advertising, Inc. and became Chairman. His clientele included General Foods, Kraft, Best Foods, and Manischewitz Foods.

For the last 40 years, Dick was very active in the nonprofit community. He served on the Boards of the Educational Alliance, a settlement house on the lower East Side, the Beth Israel Hospital, the Jewish Home and Hospital for the Aged, and the Federation of Jewish Philanthropies.

We and our clients shall miss his wise and thoughtful participation in our work.

Lifetime Achievement Award

NESC President Honored by her Alma Mater



Betsy Weber, NESCS's President since January 2006, was awarded the Lifetime Achievement Award in June at her 50th Reunion at Wheaton College in Norton, MA. The prestigious award was presented to Ms. Weber by Ronald A. Crutcher, President of the College and by Zoe Hack, the President of the Wheaton Alumnae Association.

Ms. Weber was cited by the College for her long time service to the college, where she has served in many roles since graduating in 1960. She has served numerous times as a class officer, as a member of the Global Advisory Committee, and as Co-Chair of her 50th Reunion. She is now serving as Co-President of her Class.

Betsy was also cited for her active role in the international community. As a global business consultant for 30 years, she advised governments and major corporations, helping them create jobs and spur economic development. Moreover, she served people directly by importing hand crafted wares to sell on behalf of the women who made them. In 2005, Ms. Weber was appointed by the Paris-based Organization for Economic Development (OECD) to a task force charged with developing and implementing programs to support women's business activities in 18 Middle East/North African countries.

The Lifetime Achievement Award is the Alumnae Association's highest honor to a graduate. Wheaton College is a co-educational liberal arts college. Since 2000, more than 130 Wheaton graduates have won highly competitive prestigious awards for Rhodes, Marshall, Truman and Fullbright Scholarships.

Executive Search

Board Searches Continue for Key Client



Paul Barrett,
Executive Search

Paul Barrett, Head of Executive Search, recently obtained a fifth board search assignment from **Beth Abraham Family of Health Services**, based in the Bronx. The client is seeking a high level business executive candidate for its Board of Directors. The successful candidate should have experience as a Chief Executive Officer, Chief Operations Officer or Chief Financial Officer of a midsize or large corporation. The individual will be expected to be a key advisor to the Beth Abraham senior executives.

A nonprofit innovative health facility located in the Bronx and lower Manhattan with over 3000 employees, Beth Abraham enables people of modest means to maintain their health and independence, both within their homes and in state-of-the-art residential settings. Board meetings are usually held on a quarterly basis in downtown Manhattan.

Board Member Update

Kirksey Named Head of National MultiCultural Institute



John R. Kirksey

NESC Board Director, **John R. Kirksey** was named President of the prestigious National MultiCultural Institute (NMCI), in July 2010. In making the announcement, the NMCI stated that Mr. Kirksey has gained a reputation as an expert in the diversity and human resources areas. He formerly held top management positions at AXA Equitable, Pricewaterhouse Cooper, and Marsh & Mc Lennan.

NMCI is a Washington, DC nonprofit that provides conferences, publications, private consultation and training on issues of workforce diversity and multiculturalism in support of its mission to advance the building of more inclusive organizations.

Last Word

A Timely Review of NESC Operations



**NESC President
Betsy Weber**

After a bruising 2009, when many non-profits lost financial and other resource support, 2010 seems to have been a year of assessment and of reflection.

NESC has been working with many of our clients to help them examine their core programs to see if they still fit with their missions and can still be delivered cost effectively and efficiently to their constituents. We are also looking at their Boards to see if there is room for improvements, either by adding new members with specific skills, or undertaking some training or facilitation to help them be more effective.

NESC is no exception; we are reviewing our operations as well.

After a careful assessment, beginning early in 2010, we have taken several steps to strengthen our firm by adding new management in several of the regions and in several of our sectors. New Regional Directors, **Bob O'Connell** on Long Island, and **Deborah Brennan** in SW Connecticut, are two very

strong executives who are already re-energizing their respective regions. **Mary Anne Liss**, who has been expanding NESC's networks for over a year, will parlay that ability into a new role as Manager of Client and Philanthropy Development.

We have recast Social Enterprise to a new Sector and appointed **Joe Townsend** to lead our program to help nonprofits turn excess capacity (human, physical, technological, and social) into new revenue streams. We believe that Social Enterprise will play a big role in helping our nonprofit clients identify and monetize underperforming assets to achieve consistent cash flow. **Anne Finn**, an NESC consultant and head of our marketing practice group, has been appointed Senior Vice President for Social Services, an important constituency for NESC. While government reimbursements for Social Service agencies' community services have been greatly reduced, their services are in greater demand as more and more New Yorkers find they need supporting services.

At the Board level, NESC has added three new members. Two were formerly members of NESC's Advisory Board: **Shelly Hirshon**, Esq. from Proskauer Rose LLP, and **Michael Kubin**, a member of the management team at Ionic Media. The third

new Board member, **Stephanie Whittier**, is Executive Director at Morgan Stanley Foundation and Endowment Services. And **Richard Adler**, Managing Director of European Investors, has joined our Advisory Board.

We believe that these new appointments to both Management and the Boards will strengthen NESC in 2011. We look forward to working with our nonprofit clients and with the consultants who serve our clients exceptionally well.

Enjoy the Holidays and we look forward to working with all of you in 2011.

National Executive Service Corps

Chairman & CEO

Marvin Berenblum

President

Elizabeth Weber

Editor

Harmon Butler

Creative Editor

Andrey Kats

55 West 39th Street, 12th Floor
New York, NY 10018

212-269-1234

www.nesc.org

For info: hbutler@nesc.org