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- All Members Luncheon
- Client Services
- Pilot Partnership with Triangle Community Foundation
- Wake County Initiative
- Iris Rose Ruffing

## Contact Us

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[escgt@mindspring.com](mailto:escgt@mindspring.com)

## Summer Doldrums? Not Here!

This is usually the time of year when work slows down, folks take summer vacations, and we get a chance to catch our breaths before the fall busy season. So far this year, our business continues to thrive, and we could not be happier. Our entire organization is working harder than ever, and we have many accomplishments to mention.

### Executive Committee



Our April Executive Committee meeting was held at the Chapel Hill Chamber of Commerce and all Committee members were present. Back row left to right: Russ Smith, Joe Glasson, Janet Colm, Mark Langford, John Gabor. Front row, left to right: Trudy Smith, Mary Ellen Bowers, Perry Colwell, Joan Lipsitz (Board Chair).

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## New Website

The Marketing Committee, chaired by Joe Glasson, has been working with Data Tech Services to redesign the ESC website. Thanks to the entire committee—Mary Ellen Bowers, Joe Glasson, Marilyn Longman, Trudy Smith, Linda Stryker-Luftig, Don Wells—for their input. **Special thanks to Marilyn Longman and Lind Stryker-Luftig for the long hours they spent creating and editing material for our new site.** Will you take a minute to log onto the site and let us know what you think about it? Our website address is [www.esctriangle.org](http://www.esctriangle.org).

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## Board of Directors

ESC's Board of Directors under the leadership of Joan Lipsitz, has transitioned from a managing board to a governing board. Many of the previous functions that were directed from the Board are now the responsibility of the Executive Director.

Our Board of Directors met before the All Members Luncheon held on May 14<sup>th</sup> at the Hope Valley Country Club. Our new 2008 – 2010 Strategic Plan was affirmed along with all Board Committee Operational Plans. The new Strategic Plan provides a clear vision of where we need to be heading.

At the Board meeting, Joe Glasson was elected Board Vice Chair. Along with his duties as Chair of the Marketing Committee, Joe will be responsible for integrating and implementing the Committees' Operating Plans into the Strategic Plan in partnership with Trudy Smith and the Board committee chairs.



Board of Directors' meeting attendees were, from right to left: Jon Mills, Joe Glasson, Don Wells, Ed Rose, Russ Smith, Beth Maxwell (new

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consultant), Tom Medlin (new consultant), Marilyn Longman, Don Tiedeman, Joan Lipsitz (Board Chair), Trudy Smith.

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## Strategic Plan 2008 - 2010

The ESC Strategic Plan for 2008 – 2010 was approved by the Board of Directors at this meeting. Highlights of the Strategic Plan are:

**Client Services and Marketing:** Increase Total Revenue by 55% by 2010, while building quality processes to support our services.

**Board Development:** Build and keep a board of directors that will best allow us to fulfill the primary ESC overall objectives as articulated in the Strategic Plan.

**Fund Development:** Increase scholarship grants, restricted grants and unrestricted donations by 40% in 2010.

**Finance Committee:** Monitor and report on (1) the fiscal solvency of the ESCGT organization and (2) the achievement of fiscal projections in the Strategic Plan.

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## All Member Luncheon

Our All Member luncheon this month was held at the Hope Valley Country Club. Our featured guest speaker, Todd Cohen, spoke to us about the nonprofit challenges in the coming years.



Todd Cohen is editor and publisher of the Philanthropy Journal, an online newspaper at [www.philanthropyjournal.org](http://www.philanthropyjournal.org) that reports on philanthropy and nonprofits and is published by the A.J. Fletcher Foundation in Raleigh.

Following are talking points from Todd's discourse:

### TRENDS IN PHILANTHROPY

“The charitable marketplace is a national treasure and resource. It plays a critical role in addressing the symptoms and underlying causes of the urgent problems our communities and society face. It also faces critical internal challenges.

Nonprofits and philanthropy represent a huge marketplace where charitable resources are exchanged, including donations, volunteer time, expertise, and products and services. The marketplace also is growing

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quickly. For decades, it has grown faster than the government or business sectors.

Some facts: The U.S. has over 1 million nonprofits. Nonprofits represent 5 percent of GDP. Nonprofits represent 1 in 10 jobs. Charitable giving totaled \$295 billion in 2006, more than double from 1996. 26.7 percent of the population volunteers, for a total of 61.2 million volunteers. At least \$41 trillion in wealth is expected to be transferred between generations over 50 years, with at least \$6 trillion going to charity.

So, the charitable marketplace is huge, but that marketplace faces tensions. The marketplace is growing and increasingly competitive, and **nonprofits are under growing pressure:**

\* to raise money, and develop business and fundraising strategies to survive and thrive for the long-term

\* to build and engage boards that will effectively oversee their organizations and do what is needed to help them grow and succeed

\* to diversify and engage their base of donors and volunteers

\* to deliver services effectively

\* to account for their costs

\* to measure their impact

\* to collaborate with other nonprofits and with government and business, unleashing the power of productive teamwork

\* to find and keep a new generation of smart leaders, and groom the next generation, in the face of an imminent crisis because of executive turnover, often because of stress, fundraising pressure and a lack of board support

\* to fix flawed public policies to address the symptoms and causes of social problems

**Foundations also face growing pressure:**

\* to increase share of assets they pay out each year (legal payout requirement is 5 percent, and includes both overhead and grants)

\* to increase grant dollars to support nonprofit operations

\* to limit excessive compensation and perks and insider deals

All these trends reflect what's happening in the charitable marketplace throughout the U.S. These trends also reflect what's happening right here in the Triangle.

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May, 2008

The Triangle is home to an estimated 5,000 nonprofits, and more all the time.

We are smart and affluent, but we also face urgent social problems. We need smart nonprofits and smart givers, but nonprofits are overworked, understaffed, and they lack the resources they need to meet the rising demand for services. Nonprofits need investment to build their operating capacity, so they can be more effective in their work and sustain themselves for the long-term

Operating effectively and thriving is critical, because nonprofits and givers are the agents of change in our society. To get the investment they need, not just money, but also expertise and volunteerism, they need to do a better job telling their stories.

It's a great story. It's the story of America. And it does not need to be complicated. The challenge is to invest a little time boiling that story down to basics: what do you do, what difference do you make, why should potential givers, investors and partners care? And when you have your story, and can tell it in plain terms, in a few sentences, keep saying it to everyone who will listen, keep perfecting it and simplifying it.

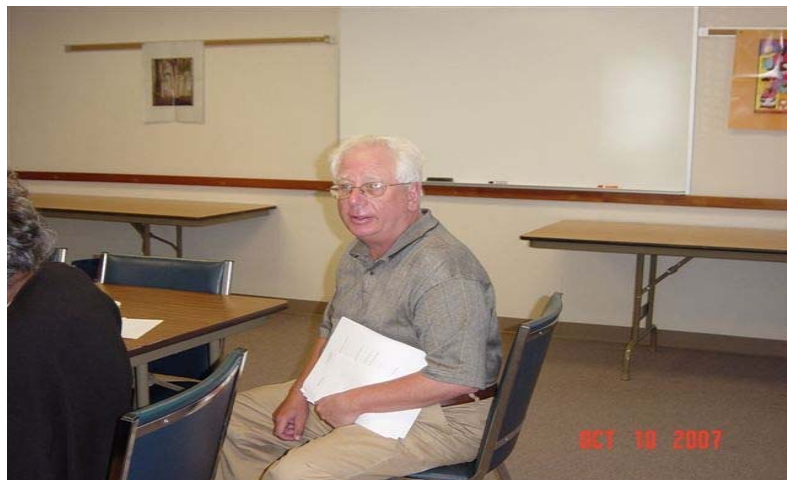
Your story is important, and the more you say it, the better the chance more people will understand it. And that's how you develop your base of support."

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Following Todd's address, a lively discussion followed with ESC members expressing their agreement with and their own experiences with the points Todd made.

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## Client Services



Thanks to Julian Wachs for his service as Chair of the Client Services Committee for the past 2 years. Some of the projects and clients counseled in the past under Julian's leadership have been tremendously exciting and we intend to build on these initiatives. Julian is now

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May, 2008

spearheading the Wake County Initiative which will increase our presence in Raleigh, Cary and Apex.

Don Tiedeman has agreed to take on the Client Services Committee as Chair and we ask everyone to work with Don to move the organization in new and innovative ways to help our clients achieve their missions. As you attend meetings and gatherings, be sure to mention ESC whenever possible to increase our client base.



Attendees at the first Client Services meeting this year were, from left to right, Perry Colwell, Marilyn Longman, Rusty Myer, Paul D'Angelo, Don Tiedeman, John Gabor, Trudy Smith.

## Consultants

Our Consultant Development program headed by Marilyn Longman has been very successful and we held New Consultant Orientation in April of this year for 7 new consultants. We are happy to welcome Mary Alexion, Dick Cashwell, Karin Douglas, Dorothea Gaulden, Beth Maxwell, Tom Medlin and Larry Stern and hope their association with ESC will bring them a strong sense of contributing to our community.

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## Pilot Partnership with Triangle Community Foundation

Since November 2007, ESC has been involved in a pilot partnership with Triangle Community Foundation (TCF) to provide consulting services to a small group of Triangle nonprofits. TCF contributed the major share of the fees for these projects which included Executive Coaching, Board Development and Strategic Planning for select nonprofits that needed our services and, yet, were not able to pay our fees. We have just been approved for a second grant from TCF, in the amount of \$10,000, for

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work to begin this summer with a new group of nonprofits. We are excited about the possibility of reaching more organizations and continuing to help strengthen the Triangle nonprofit sector.

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### Wake County Business Initiative

As part of our newly completed Strategic Plan, ESC has established a group of consultants and other ESC members to increase our Wake county client base. This group, headed by Julian Wachs, is making plans to help us expand our services in Wake county, a largely untapped market for ESC. Action items for Wake will include the development of funder and association relationships, meetings with client groups, and the solicitation of referrals from former clients.

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### Iris Rose Ruffing

ESC lost a strong advocate and friend this year with the passing of Iris Rose Ruffing. Over the years, Iris Rose served ESC in many roles. Her enthusiasm for her work with ESC and her support of our mission, our volunteers and our board members are legendary. The Iris Rose Ruffing Scholarship Fund has been established in her name to recognize her contributions to ESC. To date, we have received nearly \$1500 in contributions which, in keeping with her wishes, will be used to support our work with clients who serve the interests of women and girls.