

CONSULTING DAY FOR NEW YORK CITY'S NONPROFIT COMMUNITY

Consulting Day Report 2008

Center for Nonprofit Strategy and Management

School of Public affairs

Baruch College

City University of New York

2008

BaruchCOLLEGE
The City University of New York
SCHOOL OF PUBLIC AFFAIRS

Executive Summary

This report describes Consulting Day 2008, its history and structure, and discusses results of the Consulting Day Survey 2008, which was completed by the participants of the event. Two separate online surveys for consultants and participants were conducted. Overall, 55 responses were received for both surveys. The survey asked participants regarding their Consulting Day experiences, such as the number of consultations attended or number of clients advised, range of topics discussed, and usefulness of the advice received or preparedness of the clients. Survey participants also rated various aspects of the Consulting Day, including helpfulness of the staff, organization of the event, length of the consulting sessions and quality of the workshops. The survey included open-ended questions as well, so that many participants were able to share their opinions in their own words. Results of the surveys showed that Consulting Day is a useful informational and networking resource for the attendants. At the end of the report, challenges of organizing the Consulting Day and its general overview discussion follow.

Consulting Day and its Structure

Consulting Day was created by the Center for Nonprofit Strategy and Management (previously The Nonprofit Group; hereinafter referred to as “the Nonprofit Center” or “the Center”) at the School of Public Affairs, Baruch College in 2003. It is a unique event that offers free consulting sessions to members of the nonprofit community in New York City. Consulting Day takes place once every academic year, and has been one of the most significant events offered by the Center. The Center invites well-known, highly experienced consultants and practitioners who donate their time by offering free consulting sessions and contributing their knowledge to the nonprofit professionals. This year’s Consulting Day was held on March 26, 2008, in the William and Anita Newman Campus Conference Center in the Newman Vertical Campus at Baruch College. It was attended by 38 consultants and 141 clients. (For the complete list of offered topics and consultants, please see Appendix 1.) Consulting sessions were offered throughout the day, including individual sessions and two workshops.

Consulting Day Surveys

In order to assess the impact and productivity of Consulting Day, the Center for Nonprofit Strategy and Management with the support of Baruch Survey Research created the Consulting Day Survey 2008. This survey was administered by the Baruch College Survey Research Unit and consisted of two parts: 1.) consultant survey and 2.) participant survey. Approximately four weeks after the event, email invitations were sent to all 141 clients who attended, as well as 38 email invitations were sent out to the consultants. Thirty-six clients and 19 consultants completed the survey.

Consulting Day has been one of the most significant events of the Center on Nonprofit Strategy and Management. Similar to previous years, the survey responses showed once again that Consulting Day was a great success. Feedback from the consultants and clients has been overwhelmingly positive.

One of the clients commented:

“Great, great job! I have attended other workshops you've given and all have been very informative. As a person new to the nonprofit world, you have become my greatest resource for information and training, thank you!”

One of the consultants wrote:

“It's a great event and I always come away feeling good.”

Consulting Day Topics

In addition to the topics that consultants were formally discussing with their clients, the Center was interested in learning more about other topics of interest that arose during the session. According to the consultant survey, the topic most often discussed was fundraising. 16% of consultants responded that they discussed fundraising related issues with their clients. Financial issues were also of high interest to the clients (14%), as well as budgeting (12%), board relations (12%), starting a nonprofit (9%), marketing/communications (9%), use of technology (9%), public relations (5%), and legal issues (3%). Other topics of interest that represented about 11% of total responses included: outcomes, general management and organizational structure, program expansion, mergers, better visibility for their websites, online communications, advocacy, NYC real estate advice, and planning (including strategic planning).

Clients also mentioned other topics they would like to see included in the future events. 82% of clients thought that the list of topics offered at Consulting Day 2008 was comprehensive enough, however, 18 % of the respondents recommended several other areas that would be of interest to them, which included:

- Board Development
- Fee-based charity management
- Using Quickbooks in a non profit organization
- Fundraising Coaching
- Mentorship

Evaluation of the Consulting Day and its Participants

The survey asked both consultants and clients to rate different aspects of their experience at the Consulting Day. Responses proved that the event was well-organized and met high expectations of those present. Using a scale from 1 to 5 (with 5 being “Excellent”), consultants rated the overall organization of the event at 4 (Good) by 39% and 5 (Excellent) by 61%. Attendees were also pleased by the helpfulness and cordiality of the staff, which was rated at 4 by 12% and at 5 by 88% of the consultants. The overall experience of the consultants at Consulting Day was highly satisfying that was confirmed by ratings at level 4 by 47% and at 5 by 53%. All consultants were willing to participate in Consulting Day in the future.

Responses from the clients were also overwhelmingly positive:

- 89% of the clients were planning to attend Consulting Day in the following year.

- 82% thought that attending Consulting Day was a very productive use of their time.
- 74% felt that consultants enhanced their interest in the subject.
- 83% thought that the advice received from the consultants was very useful.
- 82% of the clients were satisfied by the consulting sessions.

According to the responses of 86% of the clients, consultants expressed interest in their concerns, they demonstrated an understanding of the issues (91%), seemed approachable (88%), showed respect for clients' viewpoints (83%), and were able to deal with complex subject matter (78%). Vast majority of the clients found the information and advice received on Consulting Day very useful (51%), or somewhat useful (43%) for their professional development. Clients were also asked if they attended any sessions, for which consultants were not sufficiently informative, on which 91% responded negatively. In addition, all clients agreed that event staff was helpful and courteous, 87% felt that event was very well organized and 92% would recommend Consulting Day to their colleagues.

The Consulting Day Survey asked both clients and consultants to share their thoughts regarding the length of consulting sessions, which is 45 minutes. 94% of consultants and 76% of clients deemed the length of the consulting sessions about right. 6% of consultants and 24% of clients thought they were too short.

Consulting Day Workshops

Traditionally, over the past years, Consulting Day consisted of individual 45-minute consultations only. One of the new features of Consulting Day this year, as mentioned before, was offering two

workshops in addition to the regular, individual consulting sessions, offered during morning and afternoon sessions. These group sessions covered topics we found to be most popular and highly demanded by our constituents over the last years based on Consulting Day registrations, as well as feedback and attendance at other events. Two workshops—one held in the morning and one in the afternoon—focused on “Career Planning” and “Starting a Nonprofit,” which was well-attended. In addition to a high registration number before the event, the turnout was also significantly high and 98% of attendants rated it as “Excellent” or “Good”. Attendance rates also confirmed that workshops became an important part of the event. This year, 58% of client respondents attended one or more consulting sessions. 25% attended both a workshop and a session, and 17% of the clients attended workshops only. Overall, 42% of all client respondents attended the workshops.

One of the consultants remarked:

“I thought the workshops that were added this year were a great idea.”

Another consultant suggested a future topic for the workshop that might be of interest to Consulting Day attendants:

“In my area (technology), there seem to be a couple of questions that keep popping up, and may be worth having workshops to address those questions for multiple clients: building a more visible web presence; using fund-raising/tracking software, such as Raiser's Edge.”

Reasons for Attendance and Advantages of Participation

Participants of Consulting Day were asked about their primary reason for participating in Consulting Day. Results showed that for most of the participants the main reason for attendance

was to help to improve their organization (43%). For some respondents it was personal development (20%), and improving work capabilities (15%). Still others had interest in the topics offered (12%), or were thinking about a career change (10%).

Consultants also named various important reasons for their participation in Consulting Day, which included feeling good about helping nonprofits (26%); making the nonprofit community aware of their expertise (16%); supporting the School of Public Affairs (23%); building relationships with other consultants and participants (16%); importance of networking is for their business and work (14%). Some other responses included: “Help people focus their outcome questions”. Another consultant mentioned: “[Consulting Day] helps me hone my skills while helping others”.

Consulting Day survey showed that the event brought a number of positive changes for the professional development of the clients, as well as for the advancement of their organizations. Consulting Day was thought to be a great networking opportunity by both, clients and consultants. In addition, advice from consultants helped clients to focus on areas of their work that needed it most. Advice that clients received at Consulting Day helped them in many different ways, such as creating new marketing and strategic plans, organizing better fundraising events, updating a website, considering partnerships with other organizations. One of the attendants “Developed and informed current strategy on the basis of guidance given by the consultants”, others “obtained logo”, “redesigned some brochures using the suggestions the consultant offered”, “put together a packet of marketing materials”, and “Changed presentation to potential donors”. Another client was provided with “more ideas on visibility for the organization”.

One of the clients mentioned:

“[Consulting Day] changed the way I approached and organized annual benefit”

Another client also received useful information from the consultation with Gregory Boroff:

“Updated our website to make it more user friendly. Discussing possible partnerships with large nonprofits as we are small and new. Would have never seen the benefit for the larger organization if I had not met with Gregory Boroff of Food Bank for NYC.”

One of the participants, ready to start a new nonprofit, found Prof. Sonia Jarvis’s workshop very helpful. She commented:

“Professor Jarvis's comments and ideas on starting a nonprofit were very useful to me and my team member. My team member also met with consultants whose ideas we worked into our business plan”

Other clients made such remarks:

“[Consulting sessions] made me realize I need to pay more attention to PR and advertising to get the word out about our program.”

“The organization has hired a marketing consultant, we are working to add an estore to our web site and is discussing investment options for some of its funds.”

“We have applied for funding from organizations we knew nothing about. We will soon get new volunteer board of directors.”

“5 yr development and financial plan underway and considering suggestions made for fringe benefits.”

Follow-up Contact, Networking and Past Participation

One of the most beneficial aspects of Consulting Day for its participants is that quite often they stay in contact with the consultants they met at the event. According to the survey results, 44% of

the consultants and 32% of clients had further contact with each other after following Consulting Day. However, none of the consultants developed a professional consulting relationship with the clients.

Survey results also demonstrate the nature of contact established between consultants and clients.

Responses were, as follows:

Consultants:

- Email -75%
- Phone - 25%

Clients:

- Email - 72%
- Phone 14%
- Face to face meeting - 14%

One of the clients was delighted by the consultation with Lou Miceli, and had a follow-up contact with the consultant:

“Consulting day was helpful in getting my start-up to move forward. We had a great meeting with Lou Miceli from Workforce Professionals. He sent us a very detailed follow-up email. I bought a book he suggested, confirmed things we already knew.”

Another client also appreciated the networking opportunity at the event and remarked:

“I met some people there with whom I have stayed connected.”

A consultant also noted:

“I like the fact that two of the clients called and emailed me and asked advice which I gave them.”

Even though, Consulting Day is a rewarding experience for clients, survey results showed that it is also a very beneficial and appealing event to the consultants. It is interesting to note that most of the consultants that participated in Consulting Day 2008, have been involved with the program over several past years and they always feel pleased to come back and share their expertise with others. Survey asked consultants in which years in addition to 2008, had they participated in Consulting Day. The responses were:

- 2003 – 3%
- 2004 – 10%
- 2005 – 16%
- 2006 – 32%
- 2007 – 23%
- None – 16%

On the other hand, 92% of clients had not attended Consulting Day before. Only 3% of clients attended 2006 Consulting Day, and 5% attended 2007 Consulting Day. These results show that the Nonprofit Center is effectively reaching a new group of nonprofit organizations and its recognition is growing through the nonprofit professional circles.

Consulting Day and Other Comparable Events

Consultants were asked if they had ever attended or participated in other comparable events, and to identify the sponsor and name of the event. Only one respondent identified a comparable event: AFP Conferences.

In comparison to other similar events which Consultant Day consultants have attended or participated in, Consulting Day 2008 was rated as:

- Among the best – 18%
- Better than average – 41%
- Average – 12%
- Have not attended a similar event before – 29%

Clients were also asked to identify any other similar events to Consulting Day they had attended before and to rate Consulting Day in comparison to those events. 50% of clients had not attended a similar event before. From those who had attended other events, 19% thought that Consulting Day was among the best, 24% thought it was better than average, and 8% thought it was average. Some of these events identified by the clients are listed below:

Sponsor	Name
New York Nonprofits	Philanthropy in Communities of Color
Support Center for Nonprofit Management	Various Workshops
New York Times	non profit consulting seminar
Cause Effective	Raising money from individual donors
Cause Effective	Make Your Events Special

Challenges of the Consulting Day: Registration, Attendance and Preparation Issues

Consulting Day has been an enormously productive and beneficial event, however, organizing it has been a challenge for the staff of the Nonprofit Center. The registration process for Consulting Day is a rather complex, multi-stage procedure. During pre-registration, extensive communication is needed with the participants to ensure they will be provided with the consultations they are

interested in and include them in appropriate time slots with a consultant. After deciding on a topic and time of the session, clients receive a final registration form. Each client is required to complete this form, which is a brief questionnaire asking for the client's name, his or her position in the organization, area of work, and the issues they would like to discuss with the consultant. The registration form has two main purposes: 1) to ensure that consultations stay focused on the topic and that clients arrive well prepared for the sessions; and 2) for the consultants to be informed in advance about the issues they will be discussing during Consulting Day. Right after the registration is complete, Nonprofit Center staff sends the complete registration forms to the consultant who will be advising the registrant. According to the survey responses, 67% of consultants received the questionnaire filled out by the participants in advance of the consultation. We found that some clients found it tedious to fill out the registration form, however, according to the survey results it seems that the registration form should be continued to be used in the future, as it helps the discussion to stay in focus, and the clients arrive better prepared for the sessions.

Throughout each morning and afternoon session, clients were registered for a 45-minute consultation with a consultant of their choice. According to the consultant survey results:

- 16% of consultants advised three clients
- 44% advised four clients
- 16% had five consultations
- 22% advised six clients.

Most of the clients attended 2 sessions (39%). However, since a number of registered participants did not arrive for their sessions, Nonprofit Center staff did their best to keep consultants busy and

accommodate those who did attend, with additional sessions. As a result, 16% of clients attended 3 sessions, and 5% even attended four sessions throughout the day.

Another challenge of Consulting Day is high non-attendance rates for clients. We have been trying to solve this problem, by contacting registered individuals by phone or email to remind them of an upcoming event or confirm if they will be absent. Every year, we have a long waiting list and we try to accommodate as many individuals as possible, in case if any consulting session becomes available. During the event, Nonprofit Center staff also accommodates attendees with additional consultations in case if registered individuals are absent.

When asked about the preparation level of their clients, 59% of consultants said that clients were somewhat prepared; 41% responded that they came very well prepared for the consultation. 75% of consultants also found the questionnaire helpful in making the interaction during the session more productive. In addition, 53% of consultants thought that a pre-conference contact with the participants would be helpful, discuss the issues and receive an initial response; 47% thought it would not affect the productivity of the session interactions. We think that arranging pre-conference session between consultants and clients would be extremely difficult to organize, especially when the non-attendance rates are still relatively high.

As one of the consultants mentioned:

”I think that any preparation or contacts before the conference would increase the effectiveness of the consultations, but that seems a bit self-evident. The trade-off is how much time are the consultants willing to donate for the extra contacts.”

71% of the consultants also thought that participants should bring written questions on the

day of the conference.

Consultants also provided us with suggestions for improving productivity of interaction during the sessions. Some thought that clients were well prepared. As one consultant noted:

“Given the amount of time, I think the preparation is adequate.”

Others believed the clients should bring more materials with them and be better prepared. Still others had no additional suggestions:

“I thought it was a very productive day for the participants that I met with. No suggestions.”

”There is no need. It works fine the way it is.”

Demographics of the Clients

An important aspect of Consulting Day is that our clients represent a wide variety of organizations. Main types of organizations represented at Consulting Day were: Youth Services (12%), Advocacy (9%), Arts or Culture (9%), Health Care (9%), Education (9%), and Community Development (8%). Other types of organizations, included: Elderly Services, Services for People with Disabilities, Child Welfare and Family Services, Consulting, Food & Nutrition, Faith Based, Environmental, Business to Business, Childcare and Early Childhood, Housing Development, Homeless Services, Employment and Training, Substance Abuse, Mental Health.

Majority of clients attending Consulting Day represented nonprofit sector (87%), additionally, 8% came from government organizations, and 5% were self-employed. Consulting Day clients represented a wide variety of organizations. Many of our clients hold senior positions in their organizations, however, we had professionals holding other positions as well:

- President, Executive Director or a Founder - 35%,
- Vice President, Deputy Director, Senior Manager, Chief Officer - 14%
- Administrative Staff - 14%
- Program Staff - 14%
- Consultant – 8%
- CEO - 8%
- Board Member - 5%
- Unpaid staff or intern - 2%

Our clients came from start-ups and older organizations, with small and large budgets.

Over 28% of clients came from organizations between 20 and 50 years old. We had 15% of clients attending from start up organizations, and additional 15% from organizations over 51 years old.

Most of the clients represented organizations, whose budget for 2007 was more than \$1 million. (37%). 22% of clients were employed in the organizations with the budget up to \$25,000. Additionally, 71% were employed full time, and 6% was employed part time. 9% of the attendants were not employed at the time.

Suggestions for Future Improvement

At the end of the survey, where respondents were asked to make suggestions for future improvements of Consulting Day, we received several gratifying suggestions from them:

“If possible next year it would be great if we could sign up for 4 sessions instead of 2 since the consultants you get are all so informative and helpful. I was able to sneak in 2 additional sessions this year since your extremely helpful staff noticed I was done and there were consultants free.”

Another client responded:

“Offer the Consulting Day 3 times a year, please! The workshops that Baruch's School of Public Affairs offers are great! Thank you for making them available for free to CBOs, they really make a difference in our development and growth. Thank you.”

One of the consultants remarked:

“I think you already do a superb job at this. While I know that you may not have the resources to do this more than once a year, I believe that the need and the demand exist, and if there is any way you can manage the logistics, it would be of great benefit to the nonprofit community!”

Another consultant responded:

“I think it is fine the way it is. I like the fact that the clients are serious and prepared ... You might think about a list of consultants you may want to give out to the clients.”

Another grateful client said:

“I thought it was well planned and executed and appreciated the opportunity to attend.”

Conclusion

In conclusion, Consulting Day becomes a bigger, more wide-ranging event, increasing in diversity of topics and areas, as well as number of attendants every year. Consulting Day has proved to be a highly demanded and a very rewarding event. We offered 36 consultations this year, as well as two workshops, which is a new aspect of Consulting Day. These workshops attracted many additional clients to the event, and were praised by majority of its attendants because of their interesting and engaging content. These and new sessions will continue to be offered in subsequent years. We received positive feedback on every aspect of the event from consultants, as well as clients. Attendants gained knowledge in wide variety of areas of their work and exchanged productive ideas with consultants. They found the ideas generated and exchanged during consultations valuable for improving many areas of their organizations, as well as, for their professional development. The opportunity of networking at the event was also highly appreciated by the attendants. The Nonprofit Center has been reaching out to increasing number of constituents for its events. As the survey proves, we have many new members attending Consulting Day, as well as our other events. Still, many consultants come back each year to support and advise their colleagues and improve efficiency of New York nonprofits. They are also willing to continue and stay in touch with the attendants and offer additional advice following the event, which is another valuable aspect of Consulting Day.

The Center for Nonprofit Strategy and Management will continue working on resolving the challenges that we face while managing this Consulting Day. We will also work towards incorporating some of the suggestions offered by the consultants and clients, as we continue to

organize and offer the most relevant and engaging topics for the nonprofit community to ensure that we maintain and improve the quality of this remarkable event.

Appendix 1 – Consulting Topics and Consultants

Morning Session: 9:00 am - 12:00 pm

Consulting Topic: Budget/Finance/Accounting

Consultant: Edward Sermier, VP, CAO & Corporate Secretary, Director of Program Evaluations, Carnegie Corporation

Consulting Topic: Chief Finance Officer

Consultant: Paul Firstenberg, Distinguished Lecturer, School of Public Affairs

Consulting Topic: Board of Directors

Consultant: Michael Davidson, Chair, Governance Matters; Consultant, Nonprofit Management Services

Consulting Topic: Strategic Planning

Consultant: Patricia Jones, Management and Fundraising Consultant

Consulting Topic: Capacity Building

Consultant: Barbara Krasne, Managing Director, KrasnePlows

Consulting Topic: Marketing & Communications

Consultant: Farra Trompeter, VP, Client Relationships and Strategy, Big Duck

Consulting Topic: Entrepreneurship and Social Enterprise

Consultant: James Lisher, Former Chairman and Managing Director, Lisher Company, Inc.

Consulting Topic: Executive Director

Consultant: John Corwin, Founder, Corwin Consulting LLC

Consulting Topic: Executive Coaching

Consultant: Elsa A. Rios, President, Community Impact Consulting, LLC

Consulting Topic: Managing Volunteers

Consultant: Yashvinee Narechania, Manager, Partner Marketing & Community Relations, United Way of NYC

Consulting Topic: Faith-Based Organizations

Consultant: Rev. Alfred Gill, President/CEO Faith Initiatives Development Corporation

Consulting Topic: Planned Giving

Consultant: David Clough, Director, Endowment and Planned Gifts, Educational Broadcasting Corp.

Consulting Topic: How to Approach Philanthropists

Consultant: Linda Franciscovich, Senior Vice President, US Trust Company of New York

Consulting Topic: Human Resources

Consultant: Connie Zalk, Independent Consultant

Consulting Topic: Graphic Design

Consultant: Corrine Kohlmeyer-Hymen, Art Director, School of Public Affairs, Baruch College

Consulting Topic: Technology

Consultant: Bill Ferns, Associate Professor, Zicklin School of Business

Consulting Topic: Program Evaluation & Outcomes

Consultant: Lou Miceli, Executive Director, The Workforce Professionals Training Institute

Workshops: 10:00 am - 12:00 pm

Workshop Topic: Career Planning

Debra Keenan, Principal and Founder, DKB Consulting, LLC

Workshop Topic: Planning for Retirement

Joe Cruickshank, Former Director, The Nonprofit Group, School of Public Affairs

Mary Jo Knight, Financial Consultant, Retirement Planning Specialist, AXA Financial

Afternoon Session: 1:00 - 4:00 pm

Consulting Topic: Budget/Finance/Accounting

Consultant: Kenneth Rogers, Manager, Professional Development Services, Fiscal Management Associates, LLC

Consulting Topic: Chief Finance Officer

Consultant: Lynne Weikart, Associate Professor, School of Public Affairs

Consulting Topic: Strategic Planning

Consultant: Fredrick Lane, Professor, School of Public Affairs, Baruch College

Consulting Topic: Capacity Building

Consultant: Richard Rivera, President, R&R Consulting

Consulting Topic: Marketing & Communications

Consultant: Denise Patrick, Adjunct Lecturer, Communication Studies, Baruch College

Consulting Topic: Marketing & Communications

Consultant: Gregory Boroff, Senior Vice President of External Relations, Food Bank for NYC

Consulting Topic: Entrepreneurship and Social Enterprise

Consultant: Michael Feller, President, Strategic Philanthropy Advisors

Consulting Topic: Executive Director

Consultant: Ralph Dumont, Executive Director, The Lower East Side Family Union (LESFU)

Consulting Topic: Executive Coaching

Consultant: Sarah Holland, President, The Visibility Project

Consulting Topic: Fundraising

Consultant: Hank Goldstein, President/CEO, The Oram Group, Inc.

Consulting Topic: Fundraising

Consultant: Kathy Herre, Herre Consulting, Interim Development Director and Development Consultant

Consulting Topic: Individual Gifts

Consultant: David Gallagher, President, Harvest Fundraising Counsel

Consulting Topic: Human Resources

Consultant: Ryan Smith, Associate Professor, School of Public Affairs

Consulting Topic: Managing Volunteers

Consultant: Susan Chambre, Professor, Baruch College, Sociology and Anthropology

Consulting Topic: Technology

Consultant: Joseph Difilippi, Senior Vice President and CIO, LISC

Consulting Topic: Technology, Programs for Seniors

Consultant: David Dring, Co-Founder, The Interactive Aging Network

Consulting Topic: Website Design

Consultant: Mike Humberstone, Director of Technology Operations, LISC

Consulting Topic: Program Evaluation & Outcomes

Consultant: Dan Williams, Professor, School of Public Affairs, Baruch College

Consulting Topic: Real Estate for Nonprofits

Consultant: David Lebenstein, SIOR Senior Managing Director, Not-for-Profit Division, Colliers ABR, Inc.

Workshop: 1:00 pm - 3:00 pm

Workshop Topic: Starting a Nonprofit

Sonia Jarvis, Distinguished Lecturer, School of Public Affairs