



**ESC-US Conference Call – December 8, 2016**  
**Marketing and Outreach: How to Position Your Affiliate in the Marketplace**

**Moderator:** Darlyne Koretos

**Notes:** Paul Moore

**Participants:** Abigail Oakes, Darlyne Koretos, David Factor, Felicity Palmer, Jane Greenman, Kathy Leone, Michael Towers, Murray Devine, Paul Moore, Steve Brennen, Trudy Smith, Ulia Lago, Yvonne Van Haitsma.

Darlyne explained that the notes of this call will be posted on the ESC-US website ([esc-us.org](http://esc-us.org)), in the member lounge (password Escus2014), under “Peer Sharing.”

**Ulia Lago:** Has internal and external (client-facing, funders, some community leaders) newsletter. They have been doing social media fairly regularly including 3-4 blog posts per month, working to position themselves as thought leaders. Workshops get them in front of 25 nonprofits at a time. Looking at rebranding in terms of how they are seen.

**Yvonne Van Haitsma:** One of their main marketing strategies is publishing their education courses in a catalog twice a year, which is costly. They also do an inspirational poster with their logo at the bottom and courses listed on the back. These tend to be worth keeping. They also do free quarterly roundtables which provide HR information. They have been on the business news hour several times recently. They publish a monthly e-newsletter to about 11,000 addresses and also includes a community calendar sharing info for other organizations. Not doing a great job with social media. They do volunteer recruiting through word of mouth and volunteer match on Linked-In.

**Steve Brennen:** At NESC this past year has been their first real marketing effort. Previously they were focused on sales. Their material now focuses on such things as how to do governance, which they hope will hit key words on search engines. This should also help them with thought leadership positioning. They are working on a strategic plan to better focus on board and staff leadership hot-button issues. They hope to create content that will resonate with the people they really want to reach. Each piece ends with the offer of a free consultation. Their hope is that this will drive people to them rather than their seeking people out. They are working on more social media. They have realized that their process of following up on leads needs improvement. They have done little with PR thus far but are working on positioning. (He is a volunteer consultant and was asked to help NESC itself with internal marketing.)

**Paul Moore:** ESCCO’s last strategic plan called for us to adopt a strategy of listening to our marketplace. To that end, we engaged a local comprehensive university to do a marketplace study for us, reaching out to our core target community of 450 nonprofits. The results of that study helped us decide to add several new

products, including the Organizational Focus Workshop, Organizational Changes (mergers, consolidations, and program grafting), and Clusters, which focuses on bringing together nonprofits doing similar work. All of these are within our mission, so we are not changing our mission but we are changing our product mix to the extent that this year, the Organizational Focus Workshops have outnumbered our traditional projects and coaching by a 2:1 margin. Having the right products has proven very helpful in positioning us with our traditional as well as new funders, providing about 10% of our income in this first year. Yesterday we had our first contact from a large potential client which wants us to provide a merger study for them and we expect to see more of those. We are also well along the path in a program grafting project, taking a successful program for the children of addicts from stand-alone status to an affiliation with a stronger nonprofit. We will beta test our Clusters program beginning in January. The university study showed that we are well regarded in our community; we believe these changes will only serve to increase that regard.

**Felicity Palmer** –She is Development Manager in Los Angeles. They launched social media initiatives in late 2015 with the help of an intern, and they have since added an associate. They are on Facebook, Twitter and U-tube with photography being a key part, focusing on people: Who are the people of ESC and what can they do for you? They like to highlight clients and they invite them to share their stories for posting on ESC's Facebook. The tag line on their business card was changed to better reflect what they do: Affordable coaching and consulting for nonprofits by coaches and consultants who volunteer their services. They provide business cards for Board members to help them advocate for ESC. On the back of their business card is a well-laid out list of their services. Their institutes for developing executive directors and development people now include a better showcase of what other services they can get from ESC. They are adding a standup banner listing their services. Video testimonials are being gathered by their associate, in the course of their events, using an iPhone. They run less than 30 seconds and they are being shared regularly. They are getting pro bono professional video services for longer projects. Their quarterly e-news is using Mail Chimp, showing recent projects, collaborations, awards received etc. In alternate quarters they are doing a newsletter with one topic explored in more depth by one consultant, for thought-leadership positioning. They have refreshed their website with newer stories of projects, cycled from their e-news.

**Darlyne:** Suggests that affiliates like and follow each other's Facebook pages. She'd like to get samples of things mentioned, such as the business card of which Felicity spoke. Also, please make sure that other affiliates and officers including Darlyne are getting our newsletters. She specialized in media coverage during her career. While media is not as major as it once was, it is still an important opportunity for third party verification of what we claim. Also, a marketing plan is important and will tie together the tactics we have described. (The outline from which Darlyne would have spoken was her presentation at the 2015 National Conference, and is attached to these notes electronically. She deferred the rest of her presentation in favor of an opportunity to ask questions.)

#### **Questions:**

**David Factor to Uliia:** Where do you get your stories? Response: We read! She just used a story that was in a seminary publication she receives. They put up a link to such stories. They blog only original work.

**David Factor to Uliia:** Re branding, how do you proceed? Response: They absorbed two other programs this past year. They have developed a positioning statement for each program and used them to create the umbrella statement. She is willing to share what they have come up with.

Darlyne pointed out that there is more info on Boston's material on the website under the 2016 National Conference in the Members Lounge.

**Felicity to Yvonne:** Tell us more about your poster. Response: We send out about 8,000, typically an inspirational statement with some graphic design. They are shipped folded flat and sent with a catalog. The pdf of their catalog is on their website, and the front cover is similar to their poster.

**Darlyne:** On the ESC-US website is a link to each affiliate, handy for shopping each other's materials.

**Steve to group:** Do you have problems getting consultants to write material for you? Are there opportunities to create a pool of content across the affiliates that all could tap into? Darlyne feels it is pretty easy to appeal to consultants' egos by requesting these. David sees the challenge in getting the content timely and in a quality format. They have moved to an interview format and then writing the story themselves. LA is using paid and volunteer interns to create content. Check local colleges for intern candidates. Journalism schools are a good source. Felicity said their thought piece, Executive Insights, is quarterly and is quite time-consuming. Steve does monthly publication but it has just one post rather than a whole newsletter. Darlyne said consistency is very important. Felicity said the more you do on Facebook the easier it gets to come up with content ideas. She also said posting our good stories and thought pieces would let them get picked up by other affiliates. This would help build the sense of a national brand. Darlyne said she stopped doing it due to a lack of response but encouraged the group to participate by running them through the ESC-US website. Send them to Darlyne and she will get them posted. David suggested we speak further about this at our ESC-US Board meeting next week.

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