



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), 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 Ulia: 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 Ulia: 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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From: Felicity Palmer [mailto:fpalmer@escsc.org]
Sent: Tuesday, December 13, 2016 12:43 PM
To: DKORETOS@CINCI.RR.COM
Cc: David Factor
Subject: Marketing Packet ESC of Southern California

Dear Darlyne,

I really enjoyed participating in the ESC-US conference call on Marketing and Outreach, it was a fantastic peer learning experience! As a follow-up I thought it might be helpful to pass along some samples of the new marketing materials we have initiated in the past year including:

- 1) business cards showing our refreshed tagline "Affordable coaching and consulting for nonprofits by executives who volunteer their services" and our list of services on the back (the sample is a consultant card but we also made them for our board members this year)
- 2) tabletop display cards that we put in the center of each table in small metal placecard holders at our institute training sessions with our social media hashtags and our list of services
- 3) stand-up banner design showing our list of services (will be about 6 ft tall)
- 4) redesigned e-newsletter sent through MailChimp
- 5) screenshots from a 30-second testimonial video and a longer, 2.5-minute video featuring our clients
- 6) examples of recent twitter posts in which we highlight the achievements of our clients and thank our funders
- 7) tablecloth with our logo at registration for our events

Feel free to pass these along to the ESC-US group and/or to upload them to the member lounge.

Thanks,
Felicity

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for nonprofits by executives who
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by executives who volunteer their services*



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BY EXECUTIVES WHO
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LEADERSHIP INSTITUTES**

 **ORGANIZATIONAL
ASSESSMENTS**

 **CUSTOMIZED CONSULTING
AND TRAINING**

SERVICE CORPS

▪ T O D A Y ▪



Lights, Camera, Take Action with Board Development!

For the Board members at Kids in the Spotlight, it was time to go behind the scenes and transform the organization from within to help foster youth find their voices through filmmaking!

[READ](#)



Evaluation for Top Quality Services

In our latest evaluation, **91.3% of clients surveyed strongly agreed they received high quality services** from ESC. We're excited to turn the results into action!

[READ](#)



The Power of Volunteers



ESC's Coaching Goes Global!



Celebrating Volunteer Leadership

ESC celebrates a successful collaboration with LA Works for its volunteer certification program, the Service Enterprise Initiative.

[READ](#)

Tim Kittleson, ESC coach, has the client site visit of a lifetime in Cusco, Peru with GO Campaign's local grantee Manos Unidas.

[READ](#)

We are incredibly grateful to DOVIA-LA for awarding ESC the 2016 Excellence in Volunteer Leadership Award!

[READ](#)



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EDLI Testimonial: NewGround: A Muslim-Jewish Partnership for Change

YouTube link: <https://youtu.be/RXKBBhnqwo0>

Learn more about ESC's Executive Directors Leadership Institute (EDLI)!
www.escsc.org/edli

EDLI has been really invaluable this year because I got a coach from the beginning of the year.

EDLI Testimonial: NewGround: A Muslim-Jewish Partnership for Change
Executive Service Corps of Southern California
58 views
+ Add to Share ... More

Leadership Coaching with Christopher Racster, Outfest

YouTube link: https://youtu.be/_gCbCm094w4

In March 2015, **Christopher Racster** was appointed **Interim Executive Director** of **Outfest**, a Los Angeles based organization that promotes LGBT equality by creating, sharing and protecting images on the screen.

Leadership Coaching with Christopher Racster, Outfest
Executive Service Corps of Southern California
36 views
+ Add to Share ... More

DDP XII Graduation – Tuesday, September 13, 2016

1.



Tweet Activity

Tweet Activity

Impressions	139
Total engagements	13
Likes	4
Profile clicks	3
Media engagements	2
Link clicks	2
Retweets	1
Detail expands	1

“Can you hear us now?” Incredible presentation by @Hearcenter on their #DDP2016 journey.”

2.



Tweet Activity

Tweet Activity

Impressions	89
Total engagements	3
Likes	2
Link clicks	1

“Getting @POPStheclub meeting started: "First, we eat, then we talk!" #dayinla2016 #nonprofits #NA #incarceration”

3.



Tweet Activity

Tweet Activity

ESC of Southern CA @escsocial
 Special thanks to Specialty Family Fdn for sponsoring our clients St Patrick, Immaculate Conception & St Gertrude.
pic.twitter.com/yhWTRtkbDo

Reach a bigger audience
 Get more engagements by promoting this Tweet!

Get started

Impressions	85
Total engagements	5
Media engagements	2
Likes	1
Link clicks	1
Profile clicks	1

“Special thanks to Specialty Family Fdn for sponsoring our clients St Patrick, Immaculate Conception & St Gertrude.”

Day in LA 2016 – Wednesday, September 21, 2016

1.

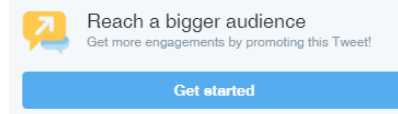


Tweet Activity

Tweet Activity

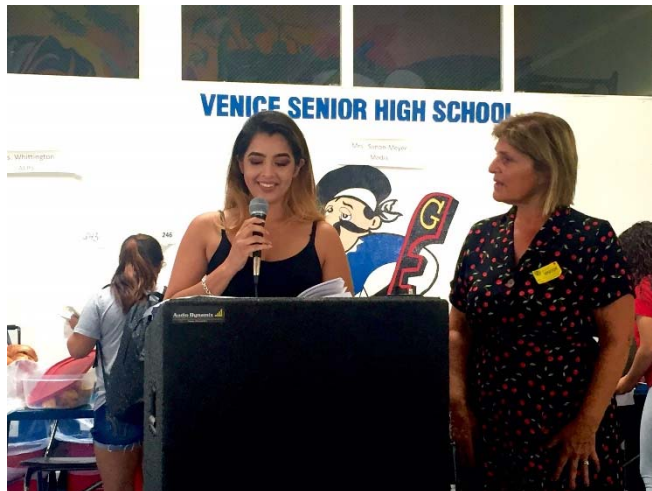


Impressions	59
Total engagements	3
Media engagements	1
Likes	1
Hashtag clicks	1



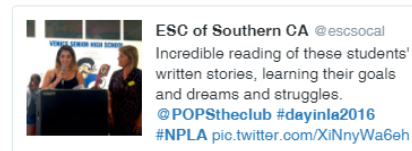
“Listening to the founding story of #Compton Youth Build with co-founders Sara and Kimberley. #dayinla2016 #npla”

2.

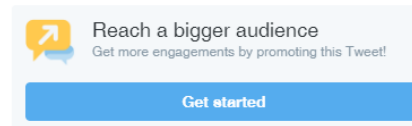


Tweet Activity

Tweet Activity



Impressions	57
Total engagements	3
Likes	2
Media engagements	1



“Incredible reading of these students' written stories, learning their goals and dreams and struggles. @POPStheclub #dayinla2016 #NPLA”

3.




Tweet Activity

Tweet Activity



Impressions	64
Total engagements	3
Link clicks	3

 Reach a bigger audience
Get more engagements by promoting this Tweet!

[Get started](#)

“Rounding out #dayinla2016 at @marvistafc with our wonderful ESC board and consultants. #nonprofits #NPLA #CradletoCareer”

Raising Your Profile

how to market your agency to attract clients, volunteers and funders



Darlyne Koretos, ESCC

Importance of Having a Marketing Plan

5 Step Marketing Plan



**What are
your
challenges?**

**What do we
want to
achieve?**

**How can we
get there?**

**What's the
cost?
Timing?
Plans?**

**How are we
doing vs
goals?
Start?
Stop?
Continue?
Next Steps?**

Digital communications



- Website
- Social media
- Blogs
- Video
- Using analytics to measure success

Branding

- How do you want to be known?
- What will grab their attention?
- Leveraging the ESC US brand



Newsletters – internal and external



- Purpose
- Audience
- Frequency

The importance of media coverage



- Third party endorsement
- Leverage coverage
- Build relationships

Using storytelling to raise your profile



- Turn dry statistics into compelling story
- Use of video
- “Live” case histories
- Endorsements
- It’s about your clients
- Audience

Annual Report--How can it help you market?



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- Useful across all audience targets
- Seek pro bono specialists
- Good photography makes it “pop”



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2014 Annual Report

