



ESC-US Conference Call – June 8, 2017

Participants: Darlyne Koretos (ESC-US President), David Factor (Southern California), Mark Grote (Cincinnati), Bert Hering (Houston), Julie Crockford (Boston), Ulea Lago (Boston), Paul Moore (Central Oklahoma), Vicky Foxworth (Southern California), Marissa Belau (Southern California), , Meghan Maloney (Southern California), Carol Hodnett (Treasure Coast, Florida), Kathy Leon (Impact Broward), Jane Greenman (NESC- New York), Michael Towers (NESC- New York), Steve Brennan (NESC- New York), Barkley Calkins (NESC- New York), Scott Hayman (501 Commons), John Kriese.

David Factor moderated. He reminded participants of the upcoming Peer Conference Calls later this year: August 3, October 5, December 7th, and the National Conference in Boston October 12-14.

For the **National Statistical Survey**, David introduced John Kriese, who once again will be designing the survey and assimilating our responses. Discussion regarding the survey:

Are there general observations about what is helpful or burdensome? No response

Re funding sources, should we divide fundraising different, to include project subsidies? Yes

Under project types, we have a category of “other.” How could we break this out? Seattle and LA seem to have a lot of it. Julie suggested adding “fellowships” – placements with nonprofits. David has “institutes” – cohorts of nonprofit leaders. We will try to dissect this further.

What could we add that would help in interactions with funders and our boards – affiliates are doing...? Governance – Outcomes (stronger connection between what we help make happen at clients and how that affects those they serve) – This will get attention at the next national conference

David asked that we put some thought into these questions and add to them.

What can we do to increase the likelihood of getting survey responses from all affiliates?

Mark from Cincinnati said they'd like to know what collaborations are going on between affiliates and others in their communities. They are working with a large NFP to do training.

We will have a small team work on this and get the survey in affiliates' hands within about a month. Please send your inputs to David.

How do you develop effective processes for lead generation?

Paul from ESCCO, Oklahoma City – Bill Phillips Award was established to honor the founder. It awards a free project to one nonprofit. Four to ten nonprofits apply and ESCCO has been able to get funding from foundation partners for the remaining worthy projects each year.

Mark from Cincinnati – interim CEO – They have a goal to increase the number of projects by 30% this year. They found organizations which needed help, and then went out to find funding the funds. This has allowed them to add a number of projects. Foundations respond to specific requests for help. Human services, arts and culture, and education are their 3 focus areas. They are seeking ways to create better visibility, partly by having consultants specializing in the 3 focus areas become involved with nonprofits and gatherings in their area.

Bert from Houston – volunteer CEO – They have focused on getting their name out into the community. They are doing evaluations and seminars to help them become known. They are drawing 70 to 100 people at the seminars. Hopefully this will lead to projects. They charge \$250 for evaluations, for a couple of hours of time. The seminars are free. Two examples of seminars are Taking Your Nonprofit into the Cloud, and New Ways of Looking at Strategies for the Future.

Julie from Boston – They are also doing seminars, hoping for a better response this time around than in the past. They do workshops for some of their funders, and see increased attendance in hope of face time with the foundation exec. They have not seen a lot of business from this. Their next workshop is on Organizational Culture. They are seeing some cross-selling among their products. They have 3 cohorts of Executive Roundtables, each with about 8 Executive Directors meeting monthly. Trudy is doing those in Raleigh as well.

Vicky Foxworth from Southern California is finding that using simple marketing techniques, like a banner listing their services, and other marketing materials, is bringing repeat business for another of their products. They are getting money from elected county supervisors for their help providing budgeted money to nonprofits. Cohort projects are being funded by donors and provided to a number of their grantees. There is a coaching component as well. The cohorts are generally meeting monthly with coaching in between sessions. This is a growth area.

Carol from Treasure Coast, which is an internal component of their United Way. “Citizen Grant Review” panels are sending them a lot of referrals; they’ve had ten requests in the last couple of months. These may be organizations that are “not quite ready” to be United Way agencies. Seminars have not brought them much business. Knocking on doors seems to be working for them. We should consider partnering closely with their local United Ways.

Kathy from Impact Broward gets most of their referrals from their partnerships with major funders like community foundations. Those funders send them organizations which have not been approved for grants. Their funding comes from funders rather than from nonprofits but they are moving toward getting financial participation from the nonprofits as well. They have good collaborations with major funders, who see a double benefit of helping ESC and also helping clients.

Steve from NESC said they utilize volunteer area leads who, in the suburbs have regions, and in the city have sectors. These are volunteers who cold call, network, attend events (make presentations where possible.) They see success at Chamber events etc. because the people they meet there are volunteers with nonprofits who need help. So far not much traffic generated from website.

Scott from 501 Commons in Seattle sees a lot of leads from word-of-mouth, e-blasts, and events like ‘501 Connects’, which is a networking event for about 500 service providers. They do “501

Talks Tech”, a tech event that is an opportunity for developing leads. About 1/3 of their volunteers are tech-related and can provide useful tips that nonprofits can put to work in their agency. They do their lead generation like businesses do, based on their prior business experience.

Yvonne from Bayer Center was detained but offered this after the call: our lead generation is usually through our classes (100 per year), our board retreats and our HR meet-ups. We also have relationships with a few professional interim directors who often use us to go in with them and help turn around an organization or its systems.

Q and A:

Steve asked how affiliates promote seminars. Julia said she uses their contact list. Bert uses SCORE’s contact list plus their own. Carol uses their 211 organization’s list of nonprofits. She also had a volunteer find lists of board members and they promote directly to them.

Paul was asked to provide more detail on their Bill Phillips Award process. See more at ESCCO-online.org for more information.

Julie asked if other affiliates would be willing to provide articles which she would use for blog posts. She would create a shareable bank of stories. Steve has analytics on many blogs and articles they’ve used in the past, some which they will share. This helps them target seminar topics based on interest levels. Darlyne said she has accumulated some from 501, Cincinnati, and others for the National website. David asked that we share the topics and also the info on how much interest they generated.

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